



# WinTen<sup>2</sup> Applicant List

## Preliminary User Manual

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User Manual Edition:

3/9/2005

***Your inside track for making your job easier!***

Tenmast Software  
132 Venture Court, Suite 1  
Lexington, KY 40511

[www.tenmast.com](http://www.tenmast.com)

Support: (877) 359-5492  
support@tenmast.com  
Marketing: (877) 836-6278  
info@tenmast.com  
Fax: (859) 367-7480



## **WinTen² Applicant List Preliminary User Manual**

User Manual Edition: 3/9/2005

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Any references to company, housing authority, or individual names or identities in examples or screen images are for demonstration purposes only and are not intended to refer to any actual organization or person.

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# INTRODUCTION

The WinTen<sup>2</sup> Applicant List program is designed for use on computers running the Windows NT, 2000, or XP operating system. The interface is designed in a Windows environment and includes point-and-click mouse actions, pull-down menus, and Windows-based help functions. This manual contains all of the information you need to use the WinTen<sup>2</sup> Applicant List program (hereafter referred to as Applicant List or AppList).

## Version Information

This is a preliminary user manual written as of 3/9/2005. Some sections of this manual may be incomplete in regard to the program released as of that date. Some sections may be inaccurate in regard to later versions of the program. It does not apply to previous versions of the program (including MS-DOS-based ones).

When Tenmast issues an update to a piece of software, we post a documentation update on our Web site at **[www.tenmast.com](http://www.tenmast.com)**. If you have a current Update & Support Agreement for Applicant List, you may download both the updated program and the updated documentation at no charge. See the Client Service Area of our Web site for detailed instructions.

## Getting Help

Although we have made every effort to make this manual as comprehensive as possible, no document can cover all contingencies. If you encounter problems with Applicant List, please call the Tenmast Training & Support Department toll-free at **(877) 359-5492** or send e-mail to **[support@tenmast.com](mailto:support@tenmast.com)**.

## Revisions

To better serve our clients, we constantly update our manuals, just as we constantly make improvements in our programs. If you find an error or omission in this documentation or have a suggestion for improving it, please call the Tenmast Marketing/Communication Services Department toll-free at **(877) 836-6278** or send e-mail to **[info@tenmast.com](mailto:info@tenmast.com)**.



# PROGRAM OVERVIEW

The WinTen<sup>2</sup> Applicant List program is designed to help you manage your agency's records on prospective subsidized housing tenants, as well as the waiting lists that determine the order in which these individuals receive available housing. Applicant List is the first point at which a prospective tenant's data enters your agency's data management system.

## **Program Integration**

As with all WinTen<sup>2</sup> software, Applicant List is designed to integrate with other programs in the WinTen<sup>2</sup> product line. This data sharing allows for more efficient operation, as multiple programs can pass data back and forth without the need for operator intervention. Applicant List integrates with the following other WinTen<sup>2</sup> modules:

### **Occupancy and Rent Calculation**

When a prospective tenant becomes an actual tenant, you record the move-in by transferring the tenant's record from Applicant List to Occupancy and Rent Calculation.

### **Rent Reasonableness**

If the tenant is moving into a Section 8 unit, you can attach the data that Rent Reasonableness has on that unit to the tenant's record while you are moving the record into Occupancy and Rent Calculation.

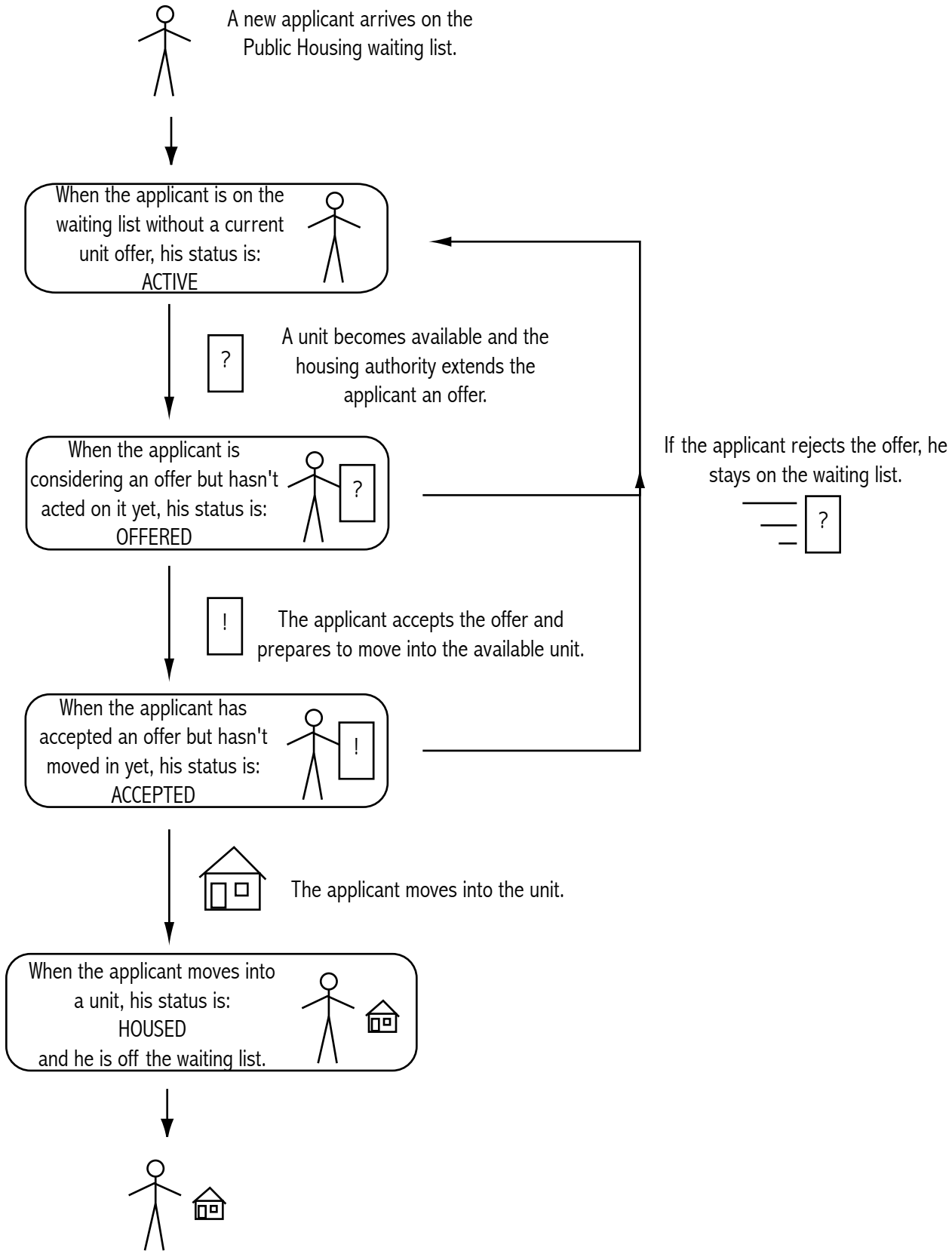
### **Tenant Accounts Receivable**

If the tenant is moving into a public housing unit, you can attach the data that Receivables has on that unit to the tenant's record while you are moving the record into Occupancy and Rent Calculation.

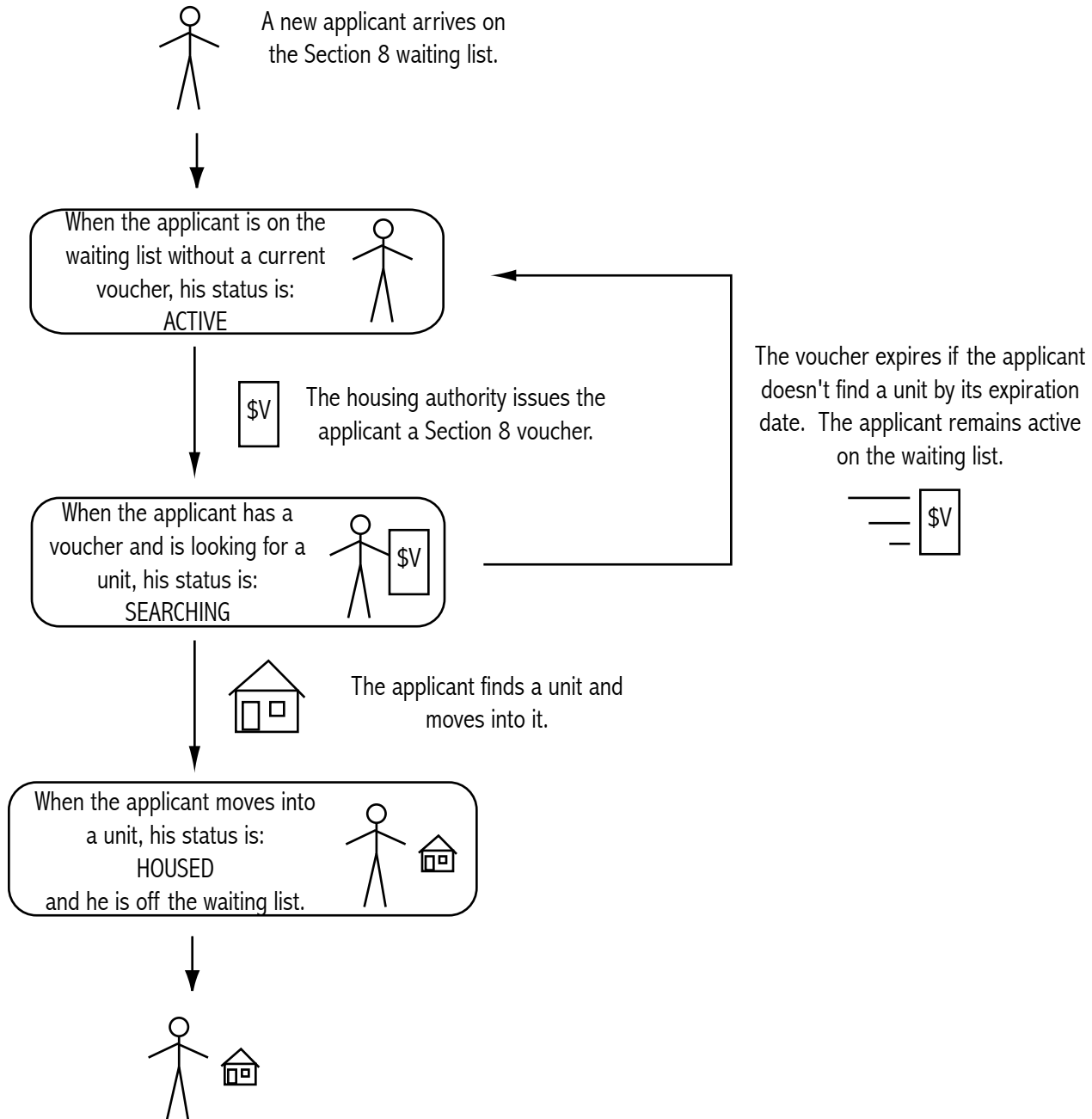
## **Data Flow**

The diagrams on the following pages illustrate the typical data flow for Public Housing and Section 8 applicants.

## Public Housing Applicant Data Flow



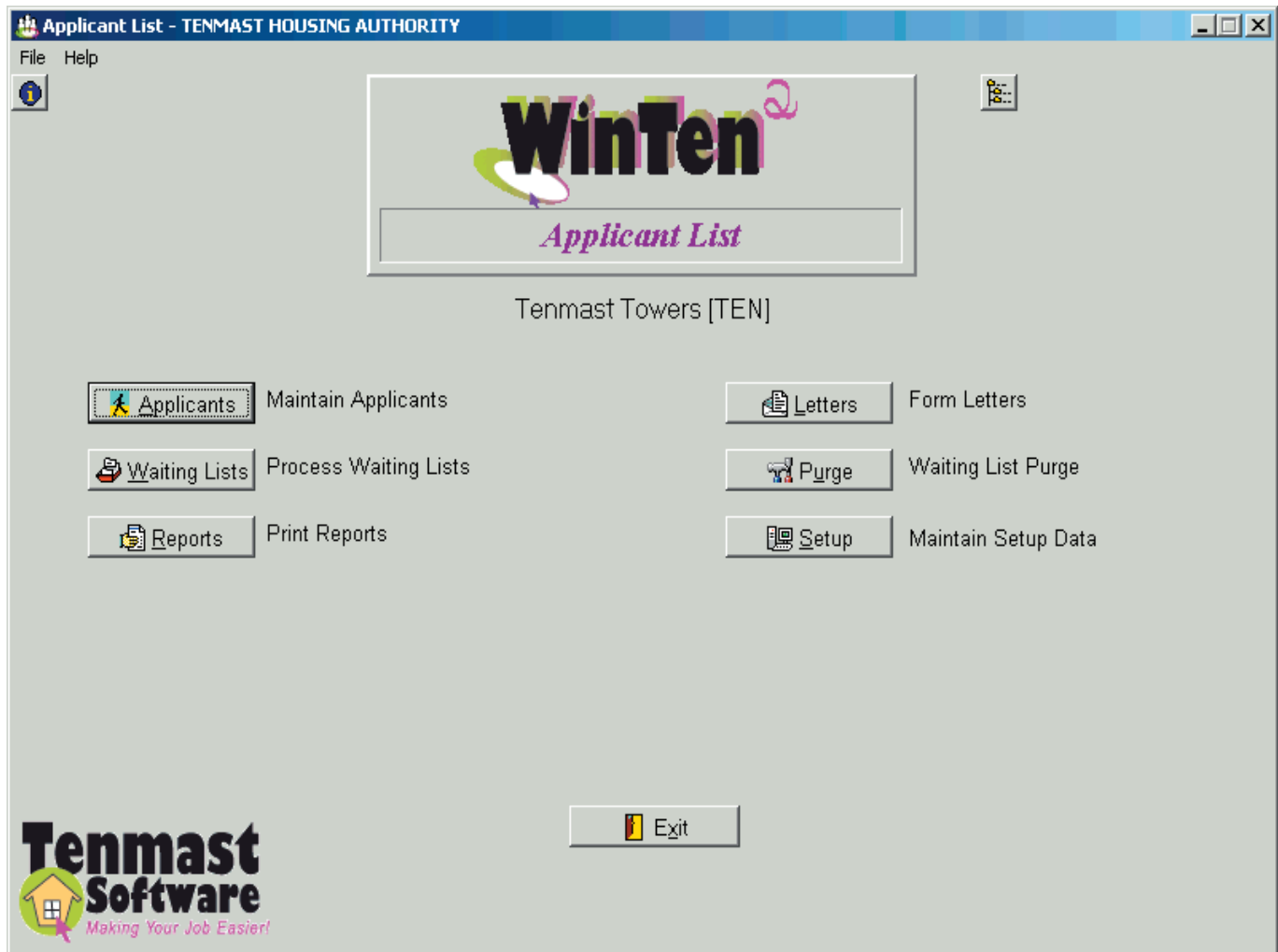
## Section 8 Applicant Data Flow





# MAIN MENU

The Main Menu is the starting point for using each function of the Applicant List program. This manual details each of these functions in its respective chapter.



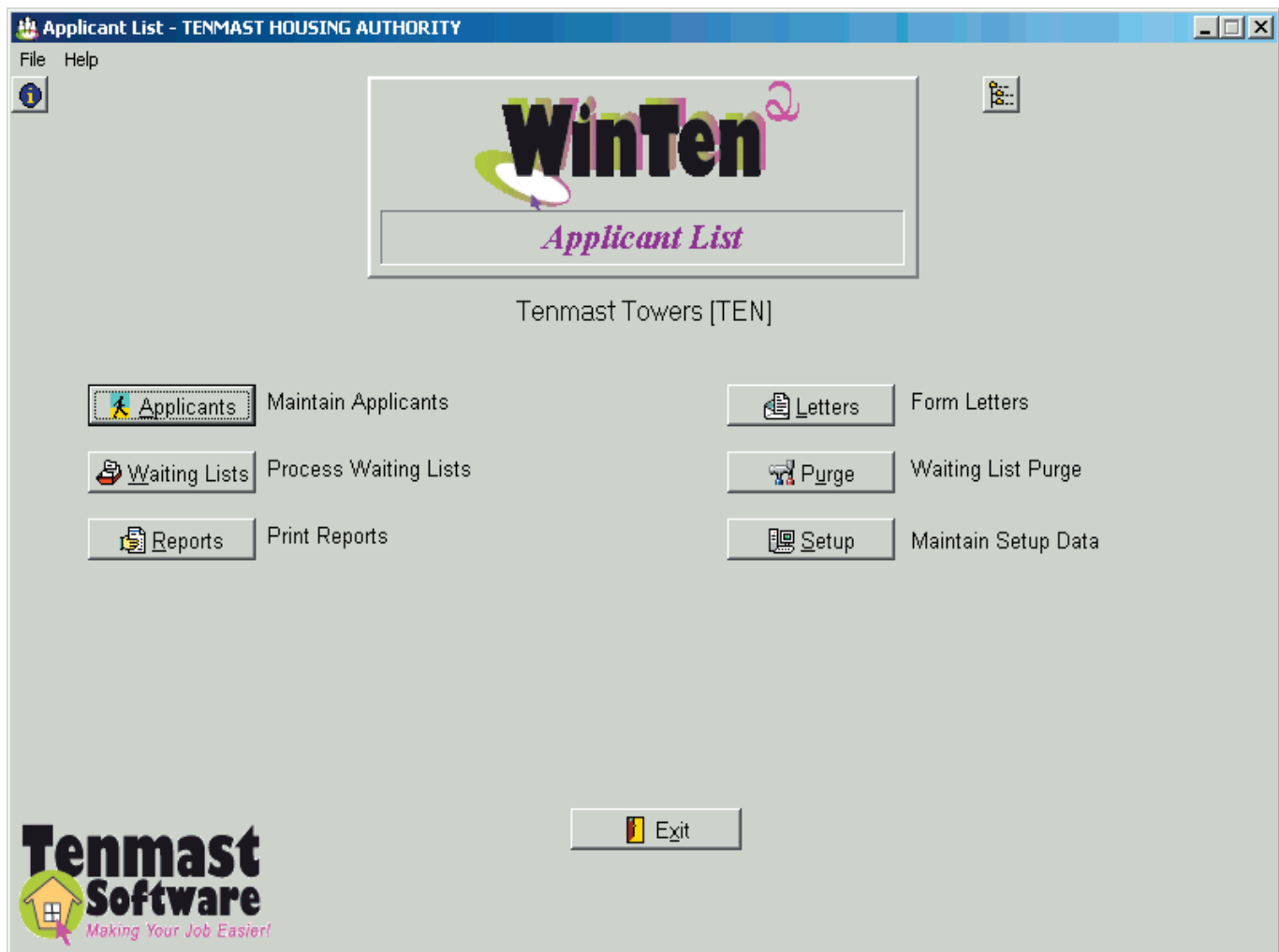


# SETUP

The first time you run Applicant List, the first option you should select from the Main Menu is Setup. All WinTen<sup>2</sup> programs have Setup functions. The settings in the Setup screen control the program environment, and you can change many aspects of the program's operation through these settings. Be careful to enter the proper information, as inaccurate settings can cause Applicant List to function in an unexpected manner.

The individual in charge of your WinTen<sup>2</sup> programs should periodically review each program's Setup to ensure that it is still correct. Access to the Setup screen should be restricted through the Tenmast Security program after the initial settings have been entered in order to prevent accidental changes to the settings.

To use the Setup functions, click the Setup button or press <S> at the Main Menu.



# SETUP SCREEN

The Setup screen has six tabs: Default Settings, Waiting Lists, Income Limits, Statuses, Actions, and Management Codes. The Setup screen always opens on the Default Settings tab, as shown below.

## Default Settings Tab

The Default Settings tab has two sub-tabs: General Settings and Search Options. It always opens on the General Settings sub-tab, as shown below.

The screenshot shows a software window titled "Set Up Applicant List". It has a tabbed interface with "Default Settings" selected. Below the tabs is a toolbar with icons for file operations and help. The main area contains various input fields for organization information. At the bottom, there are sub-tabs for "General Settings" and "Search Options", with "General Settings" currently active. The "Version" field shows "12/18/2002".

|                                                                               |                                |                                                   |               |
|-------------------------------------------------------------------------------|--------------------------------|---------------------------------------------------|---------------|
| Organization Name                                                             | TENMAST CITY HOUSING AUTHORITY |                                                   |               |
| Street Address                                                                | 132 VENTURE COURT, SUITE 1     |                                                   |               |
| City, State & Zip                                                             | LEXINGTON                      | KY                                                | 40511         |
| Telephone                                                                     | (859)455-8061                  | Fax Number                                        | (859)367-7480 |
| E-mail Address                                                                | support@tenmast.com            |                                                   |               |
| Fiscal Year Begin Month                                                       | JANUARY                        |                                                   |               |
| HUD Field Office Name                                                         | Louisville                     |                                                   |               |
| HUD Field Office Address                                                      | 5508 Shepherdsville Road       |                                                   |               |
|                                                                               | Louisville, KY 40265           |                                                   |               |
|                                                                               | (502) 491-9847                 |                                                   |               |
| Track changes and events when ...                                             |                                |                                                   |               |
| <input checked="" type="checkbox"/> Significant Applicant fields change value |                                | <input type="checkbox"/> Form letters are printed |               |
| <input checked="" type="checkbox"/> Actions are taken on an Application       |                                |                                                   |               |
| Version                                                                       | 12/18/2002                     |                                                   |               |

## Default Settings Tab Controls

### Color Button

The Color button opens the Color dialog box. Click on a color to set the background color of the Occupancy and Rent Calculation screens to that color.

Some parts of some screens may remain unchanged so they remain readable.



### Hint: Color Settings

*A color setting, like any other setting, is only applied to the current data area. Many agencies use this feature to color-code their data areas so users can tell at a glance what data area they're currently using.*

## Default Settings Tab Other Functions

### Maintain Form Letter Templates

This tab opens the Browse Templates sub-screen, which allows you to select a form letter template to edit. For more information on editing form letter templates, see the Form Letters manual.

### Maintain Caseworkers

This command opens the Maintain Caseworkers sub-screen. This sub-screen allows you to add, edit, and delete individual caseworker records.

### Maintain Income Limit Tables

This command opens the Maintain Income Limit Tables sub-screen. This sub-screen allows you to add, edit, and delete income limit tables.

### Recalculate Income Levels

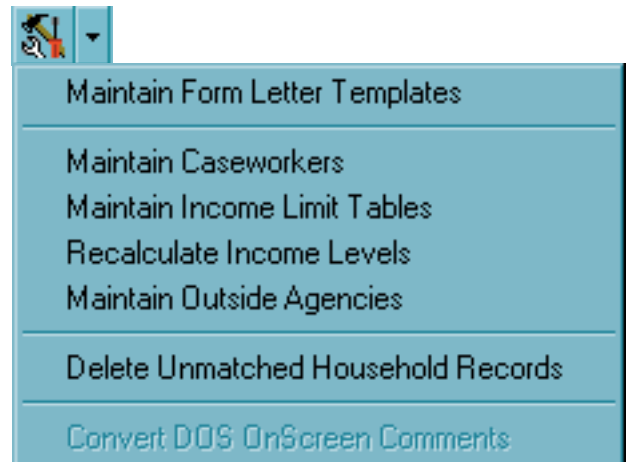
This command recalculates the income levels for all applicants and all waiting lists, using the income limit table that is selected for each waiting list.

### Maintain Outside Agencies

This command opens the Maintain Outside Agencies sub-screen. This sub-screen allows you to add, edit, and delete individual outside agency records.

### Delete Unmatched Household Records

This command starts the Remove Unmatched Household Records wizard. This wizard enables you to delete all household records that do not have matching heads of household. For more information on this wizard, see the Applicant List Task Wizards chapter.



## General Settings Sub-Tab

The General Settings sub-tab contains your agency's identifying information. It also holds contact information for your HUD field office and several options that determine how Applicant List tracks changes to tenant records. Edit the data on this sub-tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.

The screenshot shows the 'Set Up Applicant List' window with the 'General Settings' sub-tab selected. The window has a title bar with a close button. Below the title bar is a tabbed interface with 'Default Settings' selected. A toolbar with various icons is located below the tabs. The main area contains several input fields and checkboxes for agency and HUD field office information.

|                                                                               |                                |            |               |
|-------------------------------------------------------------------------------|--------------------------------|------------|---------------|
| Organization Name                                                             | TENMAST CITY HOUSING AUTHORITY |            |               |
| Street Address                                                                | 132 VENTURE COURT, SUITE 1     |            |               |
| City, State & Zip                                                             | LEXINGTON                      | KY         | 40511         |
| Telephone                                                                     | (859)455-8061                  | Fax Number | (859)367-7480 |
| E-mail Address                                                                | support@tenmast.com            |            |               |
| Fiscal Year Begin Month                                                       | JANUARY                        |            |               |
| HUD Field Office Name                                                         | Louisville                     |            |               |
| HUD Field Office Address                                                      | 5508 Shepherdsville Road       |            |               |
|                                                                               | Louisville, KY 40265           |            |               |
|                                                                               | (502) 491-9847                 |            |               |
| Track changes and events when ...                                             |                                |            |               |
| <input checked="" type="checkbox"/> Significant Applicant fields change value |                                |            |               |
| <input type="checkbox"/> Form letters are printed                             |                                |            |               |
| <input checked="" type="checkbox"/> Actions are taken on an Application       |                                |            |               |
| Version                                                                       | 12/18/2002                     |            |               |

At the bottom, there are two buttons: 'General Settings' and 'Search Options'.

## **General Settings Sub-Tab Data Fields**

### **Organization Name**

This is the name of your agency as it should appear on official reports to HUD.

### **Street Address**

This is your agency's street address.

### **City, State & Zip**

This is your agency's city, state, and zip code.

### **Telephone**

This is your agency's phone number.

### **Fax Number**

This is your agency's fax number.

### **E-mail Address**

This is your agency's email address.

### **Fiscal Year Begin Month**

This drop-down selection box allows you to specify the month in which your agency's fiscal year begins.

### **HUD Field Office Name**

This is the name of your HUD field office.

### **HUD Field Office Address**

These three fields are the contact information for your HUD field office.

### *Track changes and events when...*

Applicant List is capable of recording certain events to a event log for individual applicant records. These three check boxes allow you to specify which events the program should log.

### **Significant Applicant Fields Change Value**

If this box is checked, Applicant List records every change to the significant data fields of an applicant's record. Significant data fields include all items of household, income, asset, and expense data.

### **Actions Are Taken on an Application**

If this box is checked, Applicant List records each action that a user takes on an applicant's record. For more information on applicant actions, see the Maintain Applicants chapter.

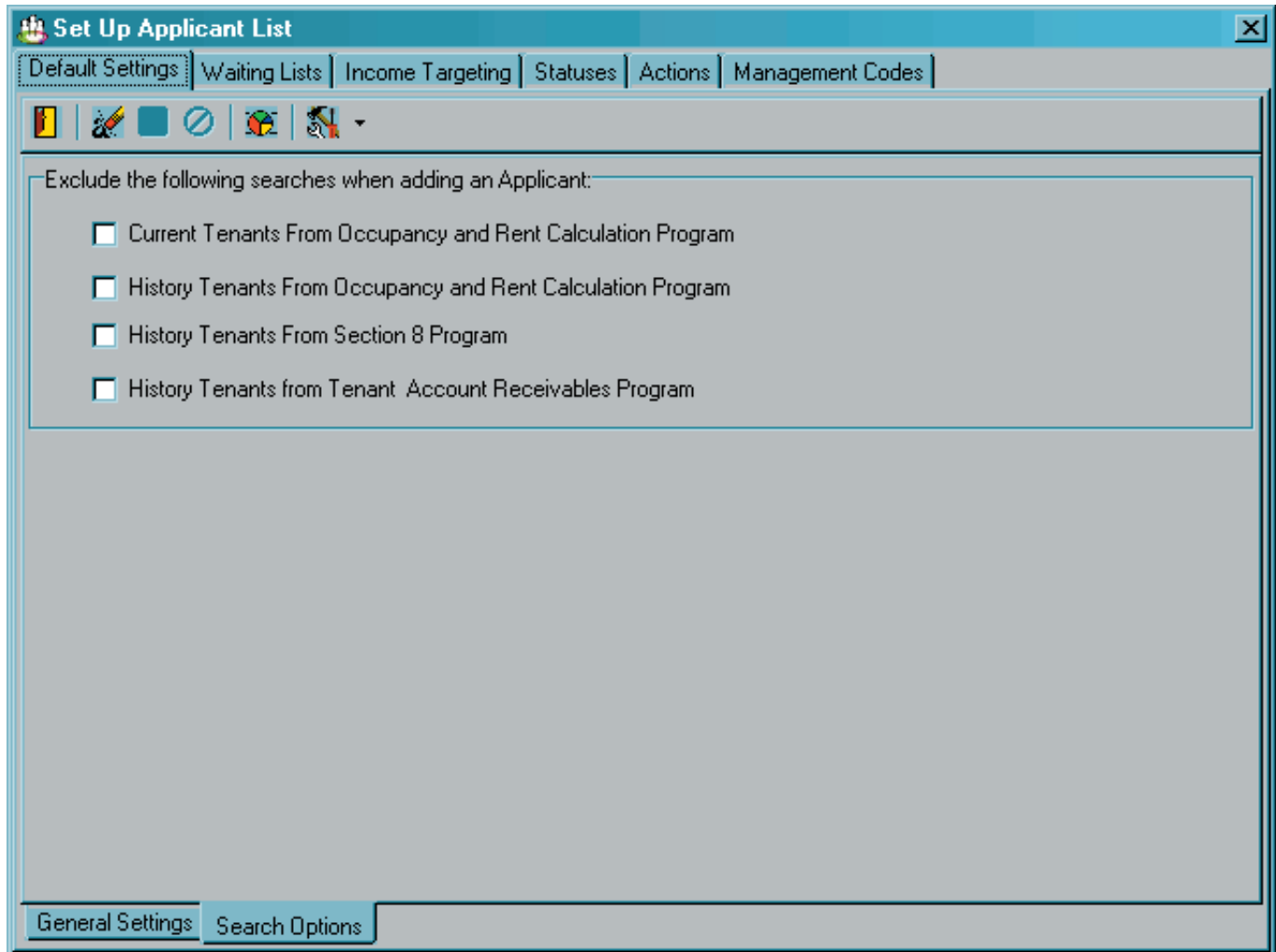
### **Verification Letters Are Printed**

If this box is checked, Applicant List records each form letter that a user prints for this applicant. For more information on form letters, see the Form Letters chapter.

## Search Options Sub-Tab

The Search Options sub-tab contains a set of check boxes that allow you to restrict the searches that Applicant List normally performs when you add a new applicant. You can use these controls to exclude certain databases from the search process. This speeds up the process of adding an applicant.

Use the standard WinTen<sup>2</sup> controls to edit the data on this sub-tab and save or cancel your changes.



The screenshot shows a window titled "Set Up Applicant List" with a standard Windows XP-style title bar. Below the title bar is a tabbed interface with the following tabs: "Default Settings", "Waiting Lists", "Income Targeting", "Statuses", "Actions", and "Management Codes". The "Default Settings" tab is currently selected. Below the tabs is a toolbar with several icons: a folder, a pencil, a blue square, a red circle with a slash, a green circle with a checkmark, a red circle with an 'X', and a dropdown arrow. The main area of the window contains a section titled "Exclude the following searches when adding an Applicant:" with a list of four items, each preceded by an unchecked checkbox:

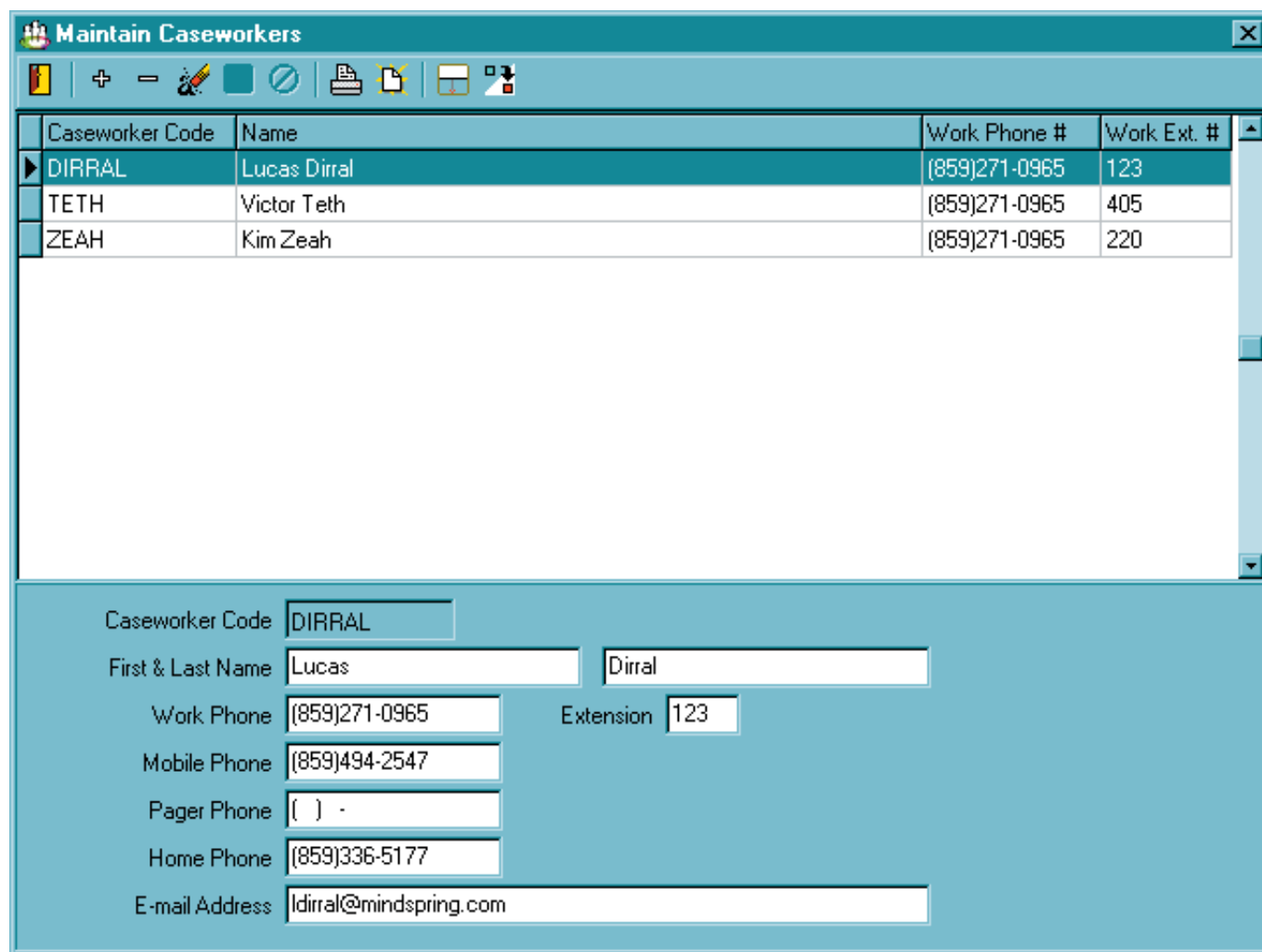
- ☐ Current Tenants From Occupancy and Rent Calculation Program
- ☐ History Tenants From Occupancy and Rent Calculation Program
- ☐ History Tenants From Section 8 Program
- ☐ History Tenants from Tenant Account Receivables Program

At the bottom of the window is another set of tabs: "General Settings" and "Search Options". The "Search Options" tab is currently selected.

# Maintain Caseworkers Sub-Screen

The Maintain Caseworkers sub-screen allows you to add, edit, and delete caseworker records. Caseworker records allow you to associate a specific caseworker with each application in Applicant List's database. The top portion of this sub-screen contains a table of all caseworkers who are currently in the database, while the bottom portion of the sub-screen contains the detailed information for the currently selected caseworker.

Edit the data on this sub-screen and save or cancel your changes with the standard WinTen<sup>2</sup> controls.



| Caseworker Code | Name         | Work Phone #  | Work Ext. # |
|-----------------|--------------|---------------|-------------|
| DIRRAL          | Lucas Dirral | (859)271-0965 | 123         |
| TETH            | Victor Teth  | (859)271-0965 | 405         |
| ZEAH            | Kim Zeah     | (859)271-0965 | 220         |

|                   |                        |           |     |
|-------------------|------------------------|-----------|-----|
| Caseworker Code   | DIRRAL                 |           |     |
| First & Last Name | Lucas                  | Dirral    |     |
| Work Phone        | (859)271-0965          | Extension | 123 |
| Mobile Phone      | (859)494-2547          |           |     |
| Pager Phone       | [ ] -                  |           |     |
| Home Phone        | (859)336-5177          |           |     |
| E-mail Address    | ldirral@mindspring.com |           |     |

## Maintain Caseworkers Sub-Screen Controls

### Change Caseworker Code Button

This button opens the Change Caseworker Code dialog box. This dialog box allows you to edit the selected caseworker's unique identifying code. When you change a caseworker code, the program updates its databases, changing that waiting list code to its new value in every record associated with that code.

A screenshot of the 'Change Caseworker' dialog box. It has a title bar 'Change Caseworker' and a text field labeled 'Caseworker Code' containing the value 'VANDEGRIFT'. At the bottom are 'OK' and 'Cancel' buttons.

| Caseworker Code |
|-----------------|
| VANDEGRIFT      |

## Maintain Caseworkers Sub-Screen Data Fields

### Caseworker Code

This is the caseworker's unique identifying code. It can be up to 10 characters long. You cannot edit this field normally; to change it, click the Change Caseworker Code button.

### First & Last Name

These fields are the caseworker's first and last name.

### Work Phone

This is the caseworker's work phone number.

### Mobile Phone

This is the caseworker's cellular phone number.

### Pager Phone

This is the caseworker's pager number.

### Home Phone

This is the caseworker's home phone number.

### E-mail Address

This is the caseworker's e-mail address.

A screenshot of the 'Maintain Caseworkers' screen. It features a table with columns: Caseworker Code, Name, Work Phone #, and Work Ext. #. Below the table are input fields for the selected caseworker's details.

| Caseworker Code | Name         | Work Phone #  | Work Ext. # |
|-----------------|--------------|---------------|-------------|
| DIRRAL          | Lucas Dirral | (859)271-0965 | 123         |
| TETH            | Victor Teth  | (859)271-0965 | 405         |
| ZEAH            | Kim Zeah     | (859)271-0965 | 220         |

|                   |                        |           |     |
|-------------------|------------------------|-----------|-----|
| Caseworker Code   | DIRRAL                 |           |     |
| First & Last Name | Lucas                  | Dirral    |     |
| Work Phone        | (859)271-0965          | Extension | 123 |
| Mobile Phone      | (859)494-2547          |           |     |
| Pager Phone       | ( ) -                  |           |     |
| Home Phone        | (859)336-5177          |           |     |
| E-mail Address    | ldirral@mindspring.com |           |     |

# Maintain Income Limit Tables Sub-Screen

The Maintain Income Limit Tables sub-screen allows you to add, edit, and delete income limit tables. Applicant List associates a specific income limit table with each waiting list in its database. The top portion of this sub-screen contains a table of all income limit tables that are currently in the database, while the bottom portion of the sub-screen contains the detailed information for the currently selected income limit table.

Edit the data on this tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.

## Hint: Income Limit Data

HUD makes its income limit table values available through the Federal Register. You can also find income limit table data for the current year online at the following Web address:

<http://www.huduser.org/datasets/il/fmr01/index.html>

**Maintain Income Limit Tables**

| Income Limit Table Code | Description    | Effective Date | Expiration Date |
|-------------------------|----------------|----------------|-----------------|
| PH                      | PUBLIC HOUSING | 10/01/2001     | 9/30/2002       |
| PH                      | PUBLIC HOUSING | 10/01/2000     | 9/30/2001       |
| S8                      | SECTION 8      | 10/01/2001     | 9/30/2002       |
| S8                      | SECTION 8      | 10/01/2000     | 9/30/2001       |

Income Limit Table Code / Description

S8

SECTION 8

Effective Date

10/01/2000

Expiration Date

9/30/2001

| Family Members | Extremely Low | Very Low | Low    |
|----------------|---------------|----------|--------|
| 1              | 11,600        | 19,300   | 30,900 |
| 2              | 13,250        | 22,100   | 35,350 |
| 3              | 14,900        | 24,850   | 39,750 |
| 4              | 16,550        | 27,600   | 44,150 |
| 5              | 17,900        | 29,800   | 47,700 |
| 6              | 19,200        | 32,000   | 51,200 |
| 7              | 20,550        | 34,200   | 54,750 |
| 8              | 21,850        | 36,450   | 58,300 |

Percent Per Family Member Over 8

5.25%

## Maintain Income Limit Tables Sub-Screen Controls

### Change Income Limit Table Code Button

This button opens the Change Income Limit Table Code dialog box. This dialog box allows you to edit the selected income limit table's unique identifying code. When you change an income limit table code, the program updates its databases, changing that waiting list code to its new value in every record associated with that code.



Change Income Limit Table

Income Limit Table Code

## Maintain Income Limit Tables Sub-Screen Data Fields

### Income Limit Table Code

This is the income limit table's unique identifying code (up to 3 characters). You cannot edit this field normally; to change it, click the Change Income Limit Table Code button.

### Income Limit Table Description

This is a short (40-character) description of the income limit table.

### Effective Date

This is the date on which the income limit table became effective or will become effective.

### Expiration Date

This is the date on which the income limit table expired or will expire.

Maintain Income Limit Tables

| Income Limit Table Code | Description    | Effective Date | Expiration Date |
|-------------------------|----------------|----------------|-----------------|
| PH                      | PUBLIC HOUSING | 10/01/2001     | 9/30/2002       |
| PH                      | PUBLIC HOUSING | 10/01/2000     | 9/30/2001       |
| S8                      | SECTION 8      | 10/01/2001     | 9/30/2002       |
| S8                      | SECTION 8      | 10/01/2000     | 9/30/2001       |

Income Limit Table Code / Description:

Effective Date:  Expiration Date:

| Family Members | Extremely Low | Very Low | Low    |
|----------------|---------------|----------|--------|
| 1              | 11,600        | 19,300   | 30,900 |
| 2              | 13,250        | 22,100   | 35,350 |
| 3              | 14,900        | 24,850   | 39,750 |
| 4              | 16,550        | 27,600   | 44,150 |
| 5              | 17,900        | 29,800   | 47,700 |
| 6              | 19,200        | 32,000   | 51,200 |
| 7              | 20,550        | 34,200   | 54,750 |
| 8              | 21,850        | 36,450   | 58,300 |

Percent Per Family Member Over 8:

### *Income Limits*

The income limit table has 24 data fields. Each of these fields corresponds to an income level (extremely low, very low, or low) and a number of household members. Each of these fields should contain the value indicated by HUD's income limit tables.

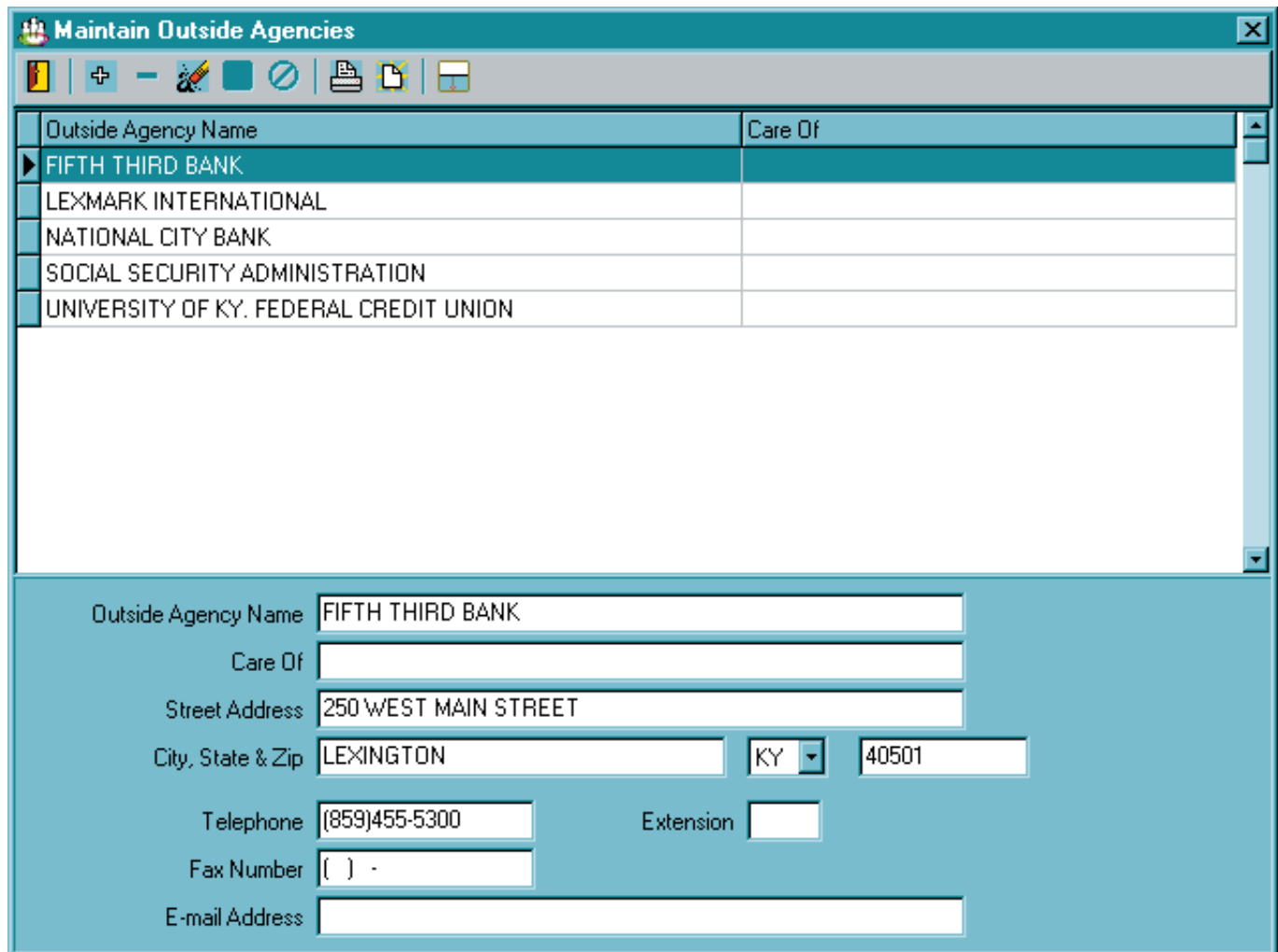
### Percent Per Family Member Over 8

This is the percentage by which an income limit should increase for every family member past 8 in a household.

# Maintain Outside Agencies Sub-Screen

The Maintain Outside Agencies sub-screen allows you to add, edit, and delete agency records. You can insert an agency record into a tenant's record as a source of income or as a holder of assets (e.g. a bank). Typically, agency records are best used for agencies with which many tenants are associated, thus removing the need to constantly look up and re-type their contact information. The top portion of this sub-screen contains a table of all agencies who are currently in the database, while the bottom portion of the sub-screen contains the detailed information for the currently selected agency.

Edit the data on this tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.



| Outside Agency Name                    | Care Of |
|----------------------------------------|---------|
| FIFTH THIRD BANK                       |         |
| LEXMARK INTERNATIONAL                  |         |
| NATIONAL CITY BANK                     |         |
| SOCIAL SECURITY ADMINISTRATION         |         |
| UNIVERSITY OF KY. FEDERAL CREDIT UNION |         |

|                     |                      |           |       |
|---------------------|----------------------|-----------|-------|
| Outside Agency Name | FIFTH THIRD BANK     |           |       |
| Care Of             |                      |           |       |
| Street Address      | 250 WEST MAIN STREET |           |       |
| City, State & Zip   | LEXINGTON            | KY        | 40501 |
| Telephone           | (859)455-5300        | Extension |       |
| Fax Number          | [ ] -                |           |       |
| E-mail Address      |                      |           |       |

## Maintain Outside Agencies Sub-Screen Data Fields

### Outside Agency Name

This is the name of the agency (up to 40 characters).

### Care Of

This is the name of the individual who handles all of your agency's correspondence with the selected outside agency.

### Street Address

This is the agency's street address.

### City, State & Zip

These three fields are the agency's city, state, and zip code.

### Telephone/Extension

These two fields are the agency's telephone number and the extension of your contact person.

### Fax

This is the agency's fax number.

### E-mail Address

This is the agency's email address or that of your contact person.

### Assigned Identifier

This is a seven-character unique identifier that Applicant List assigned to the selected agency's record. You cannot edit this field.

| Outside Agency Name                    | Care Of |
|----------------------------------------|---------|
| FIFTH THIRD BANK                       |         |
| LEXMARK INTERNATIONAL                  |         |
| NATIONAL CITY BANK                     |         |
| SOCIAL SECURITY ADMINISTRATION         |         |
| UNIVERSITY OF KY. FEDERAL CREDIT UNION |         |

|                     |                      |           |       |
|---------------------|----------------------|-----------|-------|
| Outside Agency Name | FIFTH THIRD BANK     |           |       |
| Care Of             |                      |           |       |
| Street Address      | 250 WEST MAIN STREET |           |       |
| City, State & Zip   | LEXINGTON            | KY        | 40501 |
| Telephone           | (859)455-5300        | Extension |       |
| Fax Number          | [ ] -                |           |       |
| E-mail Address      |                      |           |       |

# Waiting Lists Tab

The Applicant List program allows you to manage multiple waiting lists. The Waiting Lists tab allows you to configure these waiting lists to handle prospective tenant data in different ways, depending on your agency's needs.

The Waiting Lists tab has four sub-tabs: General, Offer/Voucher Information, Preferences, and Data Areas. It always opens on the General sub-tab, as shown below. On all four tabs, the top area of the screen contains a table of all waiting lists that are set up and the main area of the screen contains detailed information on the currently selected waiting list.

**Set Up Applicant List**

Default Settings | **Waiting Lists** | Income Targeting | Statuses | Actions | Management Codes

Waiting List Code | Description | Accepting Applications?

|     |                        |     |
|-----|------------------------|-----|
| S8A | SECTION 8, LIST A      | Yes |
| PHA | PUBLIC HOUSING, LIST A | Yes |

Waiting List Code / Description: S8A SECTION 8, LIST A

☒ Accept Applications

☐ Allow emancipated minors Minimum Age for Applying: 17

☒ Automatically assign application numbers Starting At: 32

Housing Program Type: Section 8 Default Tenant Type: Section 8 Voucher

Income Limits Table: SECTION 8

Application Ranking Order: Descending Preference Weight; Application Date/Time

Group Code: 8 ☒ Delete from THIS waiting list when housed in any waiting list in this Group

**Singles Rule Options**

☒ Apply "Singles" Rule

Include: ☐ Elderly ☐ Disabled / Handicap ☒ Homeless ☒ Displaced

**Options**

☐ Enable Income Targeting

☒ Apply Deconcentration Rule

☒ Can apply for multiple bedroom sizes

General | Offer / Voucher Information | Preferences | Data Areas

## Waiting Lists Tab Controls

### Change Waiting List Code Button

This button opens the Change Waiting List Code dialog box. This dialog box allows you to edit the selected waiting list's unique identifying code. When you change a waiting list code, the program updates its databases, changing that waiting list code to its new value in every record associated with that code.



### Waiting Lists Tab Other Functions

#### Recalculate Preference Weights for All Applicants

This command recalculates the preference weights of all applicants on the currently selected waiting list, based on the preference weights on the Preferences sub-tab.



## General Sub-Tab

The General sub-tab contains the identifying information for the selected waiting list. It also holds general data on the waiting list's specific purpose and the rules that govern applicants' eligibility for it and positions on it. Edit the data on this sub-tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.

The screenshot shows the 'Set Up Applicant List' window with the 'General' sub-tab selected. The window has a title bar and a menu bar with options: Default Settings, Waiting Lists, Income Targeting, Statuses, Actions, and Management Codes. Below the menu bar is a toolbar with various icons. A table lists waiting lists:

| Waiting List Code | Description            | Accepting Applications? |
|-------------------|------------------------|-------------------------|
| S8A               | SECTION 8, LIST A      | Yes                     |
| PHA               | PUBLIC HOUSING, LIST A | Yes                     |

Below the table, the 'Waiting List Code / Description' is set to 'S8A' and 'SECTION 8, LIST A'. The 'Accept Applications' checkbox is checked. The 'Allow emancipated minors' checkbox is unchecked, with a 'Minimum Age for Applying' of 17. The 'Automatically assign application numbers' checkbox is checked, with a 'Starting At' value of 32. The 'Housing Program Type' is set to 'Section 8' and the 'Default Tenant Type' is set to 'Section 8 Voucher'. The 'Income Limits Table' is set to 'SECTION 8'. The 'Application Ranking Order' is set to 'Descending Preference Weight; Application Date/Time'. The 'Group Code' is set to 8, and the checkbox 'Delete from THIS waiting list when housed in any waiting list in this Group' is checked.

There are two sections for rules and options:

- Singles Rule Options:**
  - ☒ Apply "Singles" Rule
  - Include: ☐ Elderly, ☐ Disabled / Handicap, ☒ Homeless, ☒ Displaced
- Options:**
  - ☐ Enable Income Targeting
  - ☒ Apply Deconcentration Rule
  - ☒ Can apply for multiple bedroom sizes

The bottom of the window has a tab bar with options: General, Offer / Voucher Information, Preferences, and Data Areas.

## General Sub-Tab Data Fields

### Waiting List Code/Description

These two fields are the selected waiting list's unique three-character identifying code and its short (40-character) description. You cannot edit the waiting list code normally; to change it, click the Change Waiting List Code button.

### Accept Applications

If this box is checked, the waiting list is open for new applicants. If the box is unchecked, the waiting list is closed.

### Allow Emancipated Minors

If this box is checked, emancipated minors can apply to this waiting list.

### Minimum Age for Applying

This is the minimum age for a prospective tenant to apply to this waiting list.

### Automatically Assign Application Numbers

If this box is checked, the program will automatically assign an application number to every new applicant on this list.

### Starting At

If the Automatically Assign Application Numbers box is checked, this is the number that the program will assign to the next new applicant on this list.

### Housing Program Type

This drop-down selection box allows you to specify the housing program type to which this waiting list applies.

### Default Tenant Type

This drop-down selection box allows you to specify the default tenant type for applicants on this waiting list. The options change depending on the housing program type specified for this waiting list.

### Income Limits Table

This drop-down selection box allows you to specify the income limits table that applies to this waiting list. The options are the income limits tables that are set up on the Maintain Income Limit Tables sub-screen.

### Application Ranking Order

This drop-down selection box allows you to specify the order in which the program displays applications on this waiting list when a user is working with the waiting list's data. The options change depending on the housing program type specified for this waiting list.

The screenshot shows the 'Set Up Applicant List' window with the following details:

- Tabs:** Default Settings, Waiting Lists, Income Targeting, Statuses, Actions, Management Codes.
- Table:**

| Waiting List Code | Description            | Accepting Applications? |
|-------------------|------------------------|-------------------------|
| S8A               | SECTION 8, LIST A      | Yes                     |
| PHA               | PUBLIC HOUSING, LIST A | Yes                     |
- Configuration Fields:**
  - Waiting List Code / Description: S8A, SECTION 8, LIST A
  - ☒ Accept Applications
  - ☐ Allow emancipated minors
  - Minimum Age for Applying: 17
  - ☒ Automatically assign application numbers
  - Starting At: 32
  - Housing Program Type: Section 8
  - Default Tenant Type: Section 8 Voucher
  - Income Limits Table: SECTION 8
  - Application Ranking Order: Descending Preference Weight; Application Date/Time
  - Group Code: 8
  - ☒ Delete from THIS waiting list when housed in any waiting list in this Group
- Options:**
  - ☒ Apply "Singles" Rule
    - Include: ☐ Elderly, ☐ Disabled / Handicap, ☒ Homeless, ☒ Displaced
  - ☐ Enable Income Targeting
  - ☒ Apply Deconcentration Rule
  - ☒ Can apply for multiple bedroom sizes

**Group Code**

This is a single-character code that designates this waiting list as belonging to a specific group of waiting lists.

**Delete from THIS waiting list when housed in any waiting list in this Group**

If this box is checked, when an applicant receives housing in any waiting list with the same group code, the program will delete that tenant from this waiting list.

*Singles Rule Options***Apply “Singles” Rule**

If this box is checked, the program enforces the “singles” rule. If this box is checked, the other four check boxes in this control group are enabled. Check the box(es) (Elderly, Disabled/Handicap, Homeless, and/or Displaced) that correspond to the groups for whom the singles rule should be enforced.

*Options***Enable Income Targeting**

If this box is checked, the program enforces HUD’s income targeting guidelines.

**Apply Deconcentration Rule**

If this box is checked, the program enforces HUD’s deconcentration rules. This option is only available if this waiting list is for a public housing program.

**Can apply for multiple bedroom sizes**

If this box is checked, applicants can submit multiple applications for units of different bedroom sizes. This option is only available if this waiting list is for a public housing program.

**Hint: What is the singles rule?**

*The singles rule is an optional rule for giving single, non-elderly, non-displaced, non-disabled, non-handicapped housing applicants lower preference than individuals or households that are elderly, displaced, disabled, or handicapped. It is defined in 24CFR5.405 (Code of Federal Regulations Title 24, Part 5, Section 405).*

*In essence, the singles rule allows you to designate displaced, disabled, and/or handicapped applicants as “preferred.” Single applicants who do not fall into a “preferred” category are moved down the waiting list to a position directly under the last applicant who does fall into a “preferred” category. Families are not affected by this re-positioning, even if no family member falls into a “preferred” category.*

**Hint: Income Targeting**

*If you check the Enable Income Targeting box, you must select an income limit table for this waiting list.*

## Offer/Voucher Information Sub-Tab

The Offer/Voucher Information sub-tab allows you to set the manner in which Applicant List handles voucher expirations and unit offer rejections. Edit the data on this sub-tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.

The screenshot shows the 'Set Up Applicant List' window with the 'Offer / Voucher Information' sub-tab selected. The window has a title bar and a menu bar with options: Default Settings, Waiting Lists, Income Targeting, Statuses, Actions, and Management Codes. Below the menu bar is a toolbar with various icons. The main content area is divided into several sections:

- Waiting List Table:** A table with three columns: Waiting List Code, Description, and Accepting Applications? It contains two rows: S8A (SECTION 8, LIST A) and PHA (PUBLIC HOUSING, LIST A), both with 'Yes' in the third column.
- Options:** Two checkboxes are present: 'Automatically assign voucher numbers' (unchecked) and 'Exclude applicants with outstanding offers and/or vouchers from the ranking process and ranking reports.' (unchecked). A 'Starting At' field is set to 0.
- Default Days:** A section with two columns: Vouchers and Unit Offers. Under Vouchers, 'Initial Voucher Days' is 60, 'Voucher Extension Days' is 30, and 'Maximum Voucher Days' is 120. Under Unit Offers, 'Unit Offer Days' is 90.
- Unit Offer Rejection / Voucher Expiration Options:** A section with a checked checkbox 'Reposition on waiting list after' followed by a field set to 1, and the text 'unit offers rejected or vouchers expired by changing the applicant's date / time to the current date plus' followed by a field set to 30, and the word 'days'.

At the bottom of the window is a tab bar with four tabs: General, Offer / Voucher Information (selected), Preferences, and Data Areas.

| Waiting List Code | Description            | Accepting Applications? |
|-------------------|------------------------|-------------------------|
| S8A               | SECTION 8, LIST A      | Yes                     |
| PHA               | PUBLIC HOUSING, LIST A | Yes                     |

☐ Automatically assign voucher numbers      Starting At

☐ Exclude applicants with outstanding offers and/or vouchers from the ranking process and ranking reports.

**Default Days**

|                        | Vouchers                         | Unit Offers                                     |
|------------------------|----------------------------------|-------------------------------------------------|
| Initial Voucher Days   | <input type="text" value="60"/>  | Unit Offer Days <input type="text" value="90"/> |
| Voucher Extension Days | <input type="text" value="30"/>  |                                                 |
| Maximum Voucher Days   | <input type="text" value="120"/> |                                                 |

**Unit Offer Rejection / Voucher Expiration Options**

☒ Reposition on waiting list after  unit offers rejected or vouchers expired by changing the applicant's date / time to the current date plus  days.

General   Offer / Voucher Information   Preferences   Data Areas

## Offer/Voucher Information Sub-Tab Data Fields

### **Automatically Assign Voucher Numbers... Starting At**

If you check this box, the program will automatically assign voucher numbers to all tenants added to the selected waiting list, starting at the voucher number entered in the data field.

### **Exclude applicants with outstanding offers and/or vouchers from the ranking process and ranking reports**

If you check this box, applicants who fit the specified criteria will not appear on ranking reports and will not be ranked on their waiting lists.

### *Default Days*

The Default Days fields are the default values for voucher expiration and extension.

### **Initial Voucher Days**

This is the number of days for which a voucher is valid when first issued.

### **Voucher Extension Days**

This is the number of additional days for which a voucher is valid when extended.

### **Maximum Voucher Days**

This is the maximum number of days for which a voucher can be valid.

### **Unit Offer Days**

This is the number of days for which a unit offer is valid when first issued.

### *Unit Offer Rejection/Voucher Expiration Options*

Applicant List can automatically move an applicant down on the waiting list if that applicant rejects too many offers or allows too many vouchers to expire. To enable this function, check this box and enter the number of rejections or expirations allowed and the number of days the program should shift the applicant's application date.

### **Hint: Section 8 Voucher Tracking**

*If Section 8 voucher tracking is enabled in the Section 8 Tenant and Landlord program, automatic voucher number assigning is not available in Applicant List.*

### **Hint: Why would I want to exclude applicants with outstanding offers and/or vouchers from the ranking process?**

*This option allows you to "filter" the ranking process to not show applicants who your agency has given the option to find a unit. The ranking process will only show applicants who haven't yet had a chance at an assisted unit.*

## Preferences Sub-Tab

The Preferences sub-tab allows you to set up preferences and preference weighting for the selected waiting list. Weighted preferences allow your agency to give certain applicants higher priorities when they are applying for housing. This sub-tab has data fields for 20 preferences and their weights. When you add an applicant to this waiting list, the program presents you with a set of check boxes that correspond to the preferences that are set up here.

Edit the data on this sub-tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.

**Set Up Applicant List**

Default Settings | **Waiting Lists** | Income Targeting | Statuses | Actions | Management Codes

| Waiting List Code | Description            | Accepting Applications? |
|-------------------|------------------------|-------------------------|
| S8A               | SECTION 8, LIST A      | Yes                     |
| PHA               | PUBLIC HOUSING, LIST A | Yes                     |

| Preference Description | Weight | Preference Description | Weight |
|------------------------|--------|------------------------|--------|
| 1. Lives in County     | 1      | 11.                    | 0      |
| 2. Works in County     | 1      | 12.                    | 0      |
| 3. Homeless            | 4      | 13.                    | 0      |
| 4. Veteran             | 2      | 14.                    | 0      |
| 5.                     | 0      | 15.                    | 0      |
| 6.                     | 0      | 16.                    | 0      |
| 7.                     | 0      | 17.                    | 0      |
| 8.                     | 0      | 18.                    | 0      |
| 9.                     | 0      | 19.                    | 0      |
| 10.                    | 0      | 20.                    | 0      |

General | Offer / Voucher Information | **Preferences** | Data Areas

## Data Areas Sub-Tab

Waiting lists serve one or more Tenmast data areas. Whenever a new applicant is added to a waiting list, the program checks the records of previous tenants in every data area that the waiting list serves. Whenever an applicant is moved out of Applicant List as a result of receiving housing, the user can place the new tenant in any data area that the waiting list serves.

The Data Areas sub-tab allows you to maintain the list of data areas that the selected waiting list serves. This sub-tab is divided into two halves. The left half contains the data areas that the waiting list doesn't serve, while the right half contains the data areas that the waiting list serves. The two buttons in the middle of the sub-tab allow you to move data areas between these two lists. Edit the data on this sub-tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.

**Set Up Applicant List**

Default Settings | **Waiting Lists** | Income Targeting | Statuses | Actions | Management Codes

Waiting List Code | Description | Accepting Applications?

|     |                        |     |
|-----|------------------------|-----|
| S8A | SECTION 8, LIST A      | Yes |
| PHA | PUBLIC HOUSING, LIST A | Yes |

Available Data Areas

|                     |
|---------------------|
| Description         |
| TRACS Documentation |

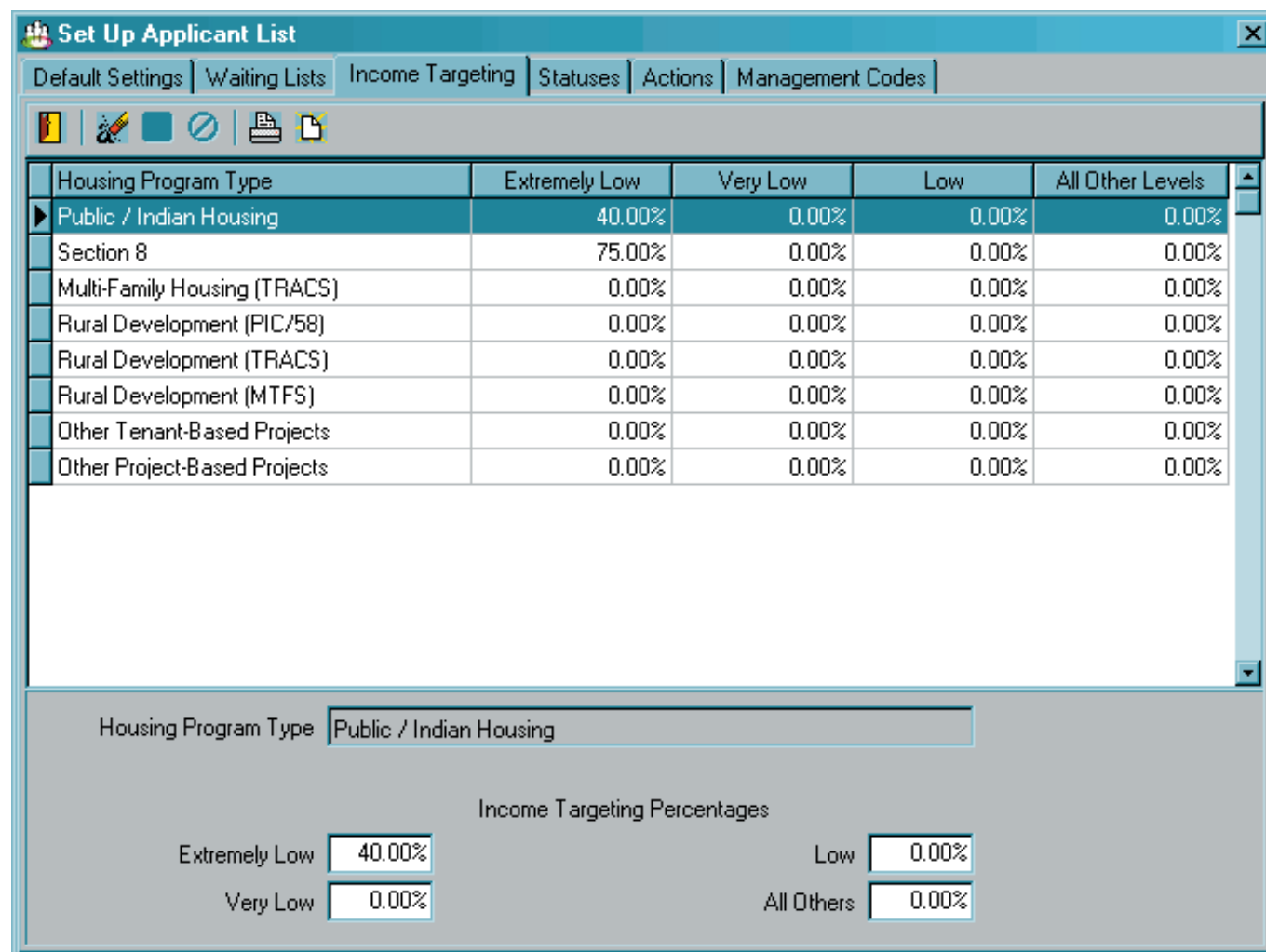
Selected Data Areas

|                              |
|------------------------------|
| Description                  |
| Public Housing Documentation |
| Section 8 Documentation      |

General | Offer / Voucher Information | Preferences | **Data Areas**

# Income Targeting Tab

The Income Targeting tab enables you to change your agency's income targeting percentages if they are different from those established by HUD as the national standards. This requires specific authorization from HUD. If your agency has secured such authorization, contact Tenmast for assistance in changing these settings.



**Set Up Applicant List**

Default Settings | Waiting Lists | **Income Targeting** | Statuses | Actions | Management Codes

Housing Program Type

| Housing Program Type         | Extremely Low | Very Low | Low   | All Other Levels |
|------------------------------|---------------|----------|-------|------------------|
| Public / Indian Housing      | 40.00%        | 0.00%    | 0.00% | 0.00%            |
| Section 8                    | 75.00%        | 0.00%    | 0.00% | 0.00%            |
| Multi-Family Housing (TRACS) | 0.00%         | 0.00%    | 0.00% | 0.00%            |
| Rural Development (PIC/58)   | 0.00%         | 0.00%    | 0.00% | 0.00%            |
| Rural Development (TRACS)    | 0.00%         | 0.00%    | 0.00% | 0.00%            |
| Rural Development (MTFS)     | 0.00%         | 0.00%    | 0.00% | 0.00%            |
| Other Tenant-Based Projects  | 0.00%         | 0.00%    | 0.00% | 0.00%            |
| Other Project-Based Projects | 0.00%         | 0.00%    | 0.00% | 0.00%            |

Housing Program Type: Public / Indian Housing

Income Targeting Percentages

Extremely Low: 40.00%      Low: 0.00%

Very Low: 0.00%      All Others: 0.00%

# Statuses Tab

Each applicant in Applicant List's database always has a status. Any action that a user performs on that applicant's record has the potential to cause a change of status, and a given action will always cause the same change of status. A user can also set an applicant's status manually. The Statuses tab allows you to edit the statuses that Applicant List recognizes for individual applicant records. Edit the data on this tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.

**NOTE: The default statuses that Applicant List always recognizes are "accepted," "active," "deleted," "housed," "ineligible," "purged," "searching," and "transferred." You cannot delete these statuses or change their status codes, though you can edit their descriptions. Typically, the only reason to add a new status is to track applicants' progress through parts of the application process, such as background checks.**

Set Up Applicant List

Default Settings | Waiting Lists | Income Targeting | **Statuses** | Actions | Management Codes

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| Waiting List Status Code | Description                              |
|--------------------------|------------------------------------------|
| ▶ ACCEPTED               | ACCEPTED UNIT OFFER                      |
| ACTIVE                   | ACTIVE ON WAITING LIST                   |
| BGCHECK                  | UNDERGOING BACKGROUND CHECK              |
| DELETED                  | REMOVED FROM WAITING LIST PER APPLICANT  |
| HOUSED                   | MOVED INTO HOUSING                       |
| INELIGIBLE               | DETERMINED TO BE INELIGIBLE              |
| PENDING                  | PENDING VERIFICATION                     |
| PURGED                   | PURGED FROM WAITING LIST DUE TO NON-RESP |
| SEARCHING                | SEARCHING FOR HOUSING WITH SECTION 8 VOU |
| TRANSFERED               | TRANSFERRED BETWEEN UNITS                |

Waiting List Status Code

ACCEPTED

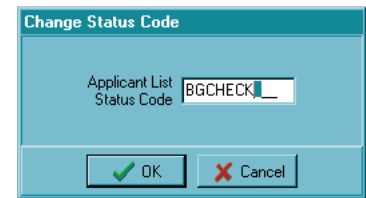
Description

ACCEPTED UNIT OFFER

## Statuses Tab Controls

### Change Status Code Button

This button opens the Change Status Code dialog box. This dialog box allows you to edit the selected status' unique identifying code. When you change a status code, the program updates its databases, changing that status code to its new value in every applicant record that has that status.



## Statuses Tab Data Fields

### Waiting List Status Code

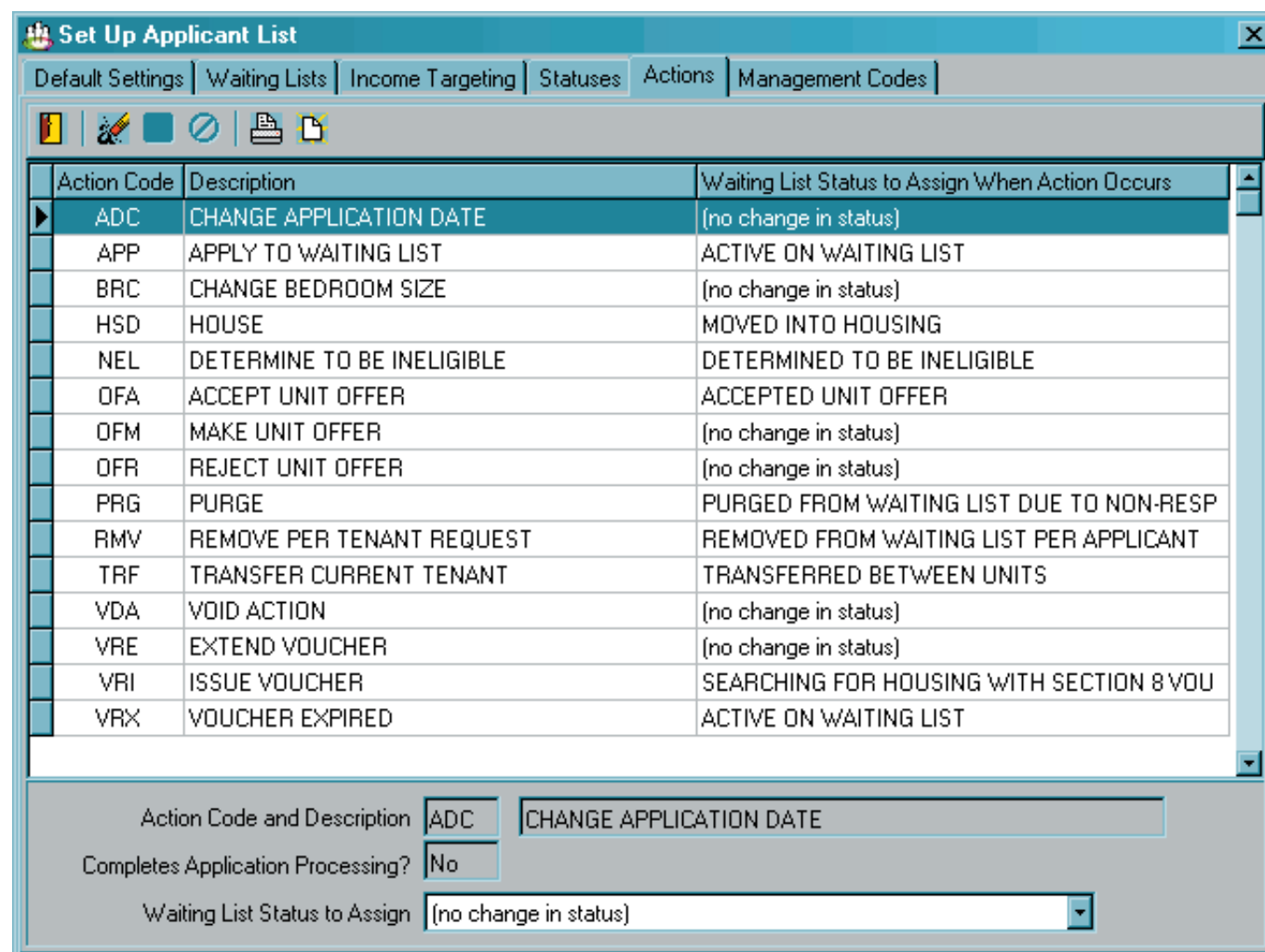
This is the unique identifier for the selected status (up to 10 characters).

### Description

This is the short description of the selected status (up to 40 characters).

# Actions Tab

When you are working with an applicant's data, you can perform several different actions. Depending on the action, this may have different effects on the applicant's record. One common effect is a change of status. The Actions tab allows you to edit the relationships between possible actions in Applicant List and the status changes they cause.



**Set Up Applicant List**

Default Settings | Waiting Lists | Income Targeting | Statuses | **Actions** | Management Codes

| Action Code | Description                | Waiting List Status to Assign When Action Occurs |
|-------------|----------------------------|--------------------------------------------------|
| ADC         | CHANGE APPLICATION DATE    | (no change in status)                            |
| APP         | APPLY TO WAITING LIST      | ACTIVE ON WAITING LIST                           |
| BRC         | CHANGE BEDROOM SIZE        | (no change in status)                            |
| HSD         | HOUSE                      | MOVED INTO HOUSING                               |
| NEL         | DETERMINE TO BE INELIGIBLE | DETERMINED TO BE INELIGIBLE                      |
| OFA         | ACCEPT UNIT OFFER          | ACCEPTED UNIT OFFER                              |
| OFM         | MAKE UNIT OFFER            | (no change in status)                            |
| OFR         | REJECT UNIT OFFER          | (no change in status)                            |
| PRG         | PURGE                      | PURGED FROM WAITING LIST DUE TO NON-RESP         |
| RMV         | REMOVE PER TENANT REQUEST  | REMOVED FROM WAITING LIST PER APPLICANT          |
| TRF         | TRANSFER CURRENT TENANT    | TRANSFERRED BETWEEN UNITS                        |
| VDA         | VOID ACTION                | (no change in status)                            |
| VRE         | EXTEND VOUCHER             | (no change in status)                            |
| VRI         | ISSUE VOUCHER              | SEARCHING FOR HOUSING WITH SECTION 8 VOU         |
| VRX         | VOUCHER EXPIRED            | ACTIVE ON WAITING LIST                           |

Action Code and Description:

Completes Application Processing?

Waiting List Status to Assign:

Actions can have “attached” statuses, which means that when you perform that action, the applicant’s record’s status changes to the status that is attached to the action. For example, if the “Give Tenant Pizza” action has the “Well-Fed” status attached to it and you give a tenant pizza, that tenant’s status automatically changes to “Well-Fed.”

Actions that result in an applicant being removed from a waiting list (completes the applicant’s application processing) are known as terminal actions. A terminal action must result in a status change, and a terminal action’s attached status must be unique to that action. For example, if the “Send to Colonize Mars” action is a terminal action (the tenant is removed from the waiting list because he’s being put on a rocket to another planet), it must have a status attached to it. If you attach the “Martian” status to the “Send to Colonize Mars” action, no other action can have “Martian” attached to it.

## Attaching a New Status to an Action

To change the status that is attached to an action, select the action you want to modify and click the Edit button. The Waiting List Status to Assign drop-down selection box becomes editable for that action. This drop-down selection box contains a list of every status that is set up on the Status tab and that is not already attached to a terminal action. It also contains a “no change in status” option. Set the Waiting List Status to Assign to the desired status and click the Save button.

### Hint: The Status-Action Relationship

*Each action has a wizard. The status that is associated with an action is the status that is given to every applicant whose record undergoes an action, as soon as the action is complete. You can manually change any applicant’s status at any time.*

### Hint: Which actions are terminal?

*The following actions are terminal actions: House, Determine to be Ineligible, Purge, Remove per Tenant Request, and Transfer Current Tenant. All of these actions remove an applicant from a waiting list.*

### Hint: Actions and Statuses

*The primary purpose of statuses (see the Statuses Tab information on the previous pages) is to allow you to track an applicant’s precise point in the sequence of steps that constitutes applying for subsidized housing. Actions have statuses associated with them so that when you perform an action on an applicant, his status changes automatically. You can also manually change an applicant’s status when you edit his record.*

*One reason for you to add a new status and attach it to an action is to see whether or not an applicant has completed a certain required step of the application process.*

*Let’s examine a common hypothetical situation that would require a new status. Your agency requires a criminal background check of all prospective applicants before they’re entered into a waiting list. You decide to add a new status, “Undergoing Background Check,” to indicate an applicant whose background check has not yet been processed. You attach this status to the “Apply to Waiting List” action, replacing the default status of “Active on Waiting List.”*

*Before you made this change, all applicants who applied to waiting lists were automatically recorded as “Active on Waiting List.” Now, all applicants who apply to waiting lists are recorded as “Undergoing Background Check.” Once an applicant completes a background check, you can edit his record and change his status to “Active on Waiting List.”*

# Management Codes Tab

Management codes are user-defined codes for sorting and filtering applicant records. You can attach a single management code to any applicant record. This allows you to sort applicant records by management code, and to filter reports so they only show applicants with a selected management code. Edit the data on this tab and save or cancel your changes with the standard WinTen<sup>2</sup> controls.

Set Up Applicant List

Default Settings | Waiting Lists | Income Targeting | Statuses | Actions | Management Codes

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| Management Code | Description                              |
|-----------------|------------------------------------------|
| GUIDEDOG        | HAS GUIDE DOG, NEEDS PET-FRIENDLY UNIT   |
| MISDEM          | MISDEMEANOR CRIMINAL RECORD, NO FELONIES |
| RETURNING       | RETURNING APPLICANT, PREVIOUSLY HOUSED   |
| SPANISH         | SPANISH-SPEAKER, TRANSLATOR REQUIRED     |

Management Code

GUIDEDOG

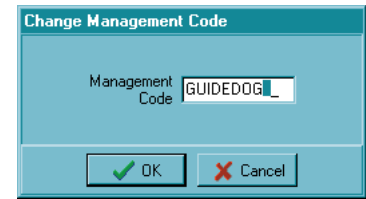
Description

HAS GUIDE DOG, NEEDS PET-FRIENDLY UNIT

## Management Codes Tab Controls

### Change Management Code Button

This button opens the Change Management Code dialog box. This dialog box allows you to edit the selected management code's unique identifier. When you change a management code, the program updates its databases, changing that management code to its new value in every applicant record that has that code.



## Management Code Tab Data Fields

### Management Code

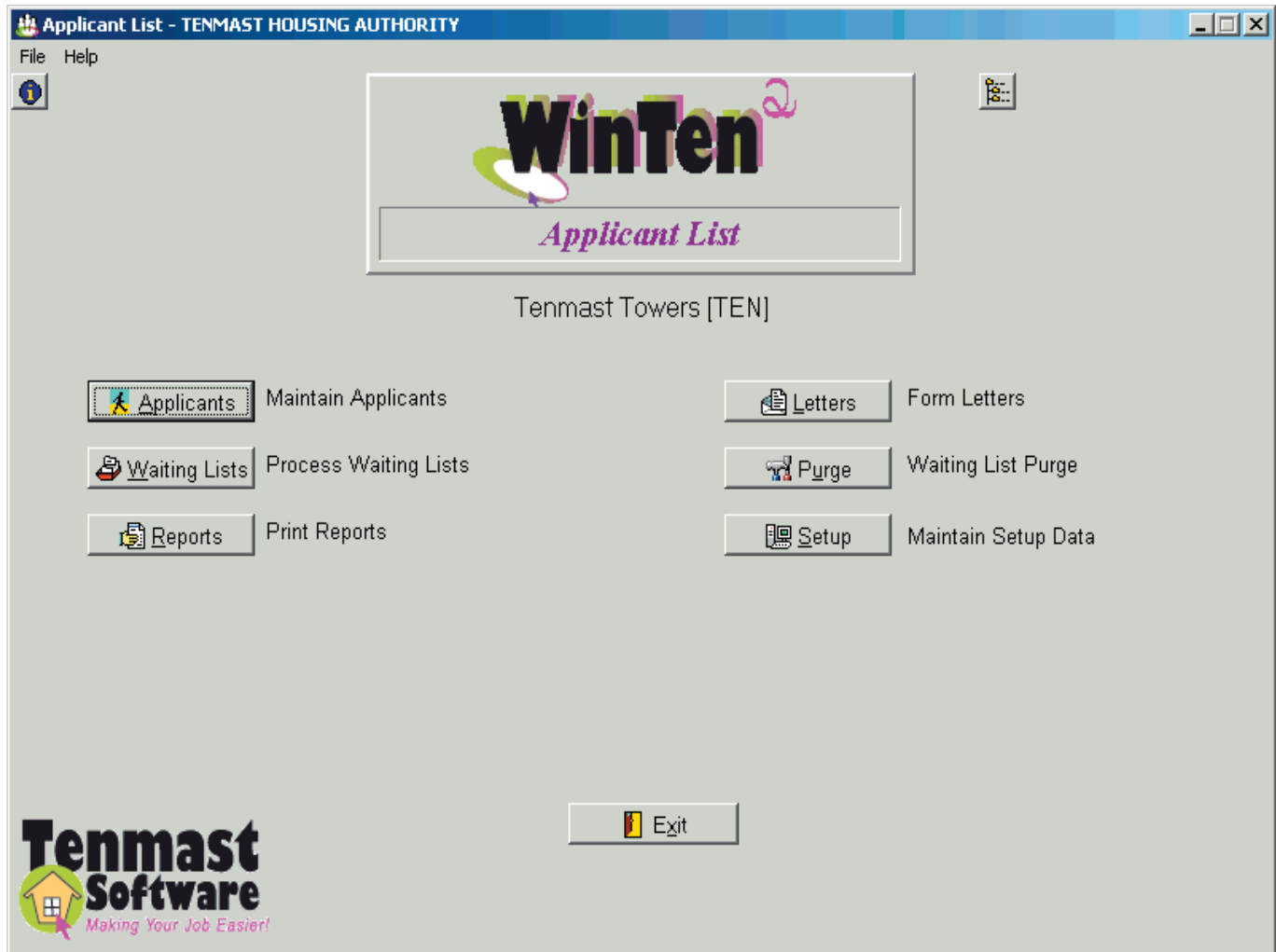
This is the unique identifier of the selected management code (up to 10 characters).

### Description

This is a brief (40-character) description of the selected management code.

# MAINTAIN APPLICANTS

The core purpose of the Applicant List program is to track the application records of the individuals who have applied for subsidized housing within your agency's jurisdiction. This job has two aspects: individual applicant records and waiting lists. The Maintain Applicants area of the program allows you to add new applicant records and edit existing ones. To access this area of functionality, click the Applicants button or press <A> at the Main Menu.



# BROWSE APPLICANTS SCREEN

The first screen that appears when you enter the Maintain Applicants area is the Browse Applicants screen. This screen contains a table of all of the applicants in Applicant List's database. From this screen, you can add a new applicant or review and edit an existing applicant's record.

The two large buttons at the top of the screen allow you to select which applicant database you are working with. Active applicants are those who have current applications active. Inactive applicants are those whose applications have become inactive because the applicants were housed, withdrew their applications, or were ineligible for subsidized housing.

Once you have chosen which database you want to use, you can either add a new applicant record or review and edit an existing one.

| Last Name  | First Name | MI | SSN         | Management Code |
|------------|------------|----|-------------|-----------------|
| ASHMORE    | GERALD     | T  | 648-61-1381 |                 |
| BABCOCK    | JOHN       | T  | 492-19-4294 |                 |
| BATES      | CYNTHIA    | A  | 341-55-8641 |                 |
| BLETHEN    | NOLAN      | H  | 114-92-7856 |                 |
| BROULLIARD | DARREN     | A  | 654-64-5113 | GUIDEDOG        |
| CHIVADORI  | ENRICO     | M  | 517-44-8156 | SPANISH         |
| GOLD       | JULIA      | L  | 364-45-1551 | GUIDEDOG        |
| GRABOWSKI  | DONALD     | P  | 451-34-8661 |                 |
| HASHIMOTO  | GREGORY    | T  | 999-99-0827 |                 |
| KIM        | MARISSA    | P  | 741-35-3107 | RETURNING       |
| KLEIN      | ROBERT     | B  | 631-44-7845 |                 |
| MICHAELS   | DANNY      | L  | 661-15-4711 |                 |
| OWENS      | DIANE      | P  | 694-51-4873 |                 |
| RENARD     | FRANCIS    | V  | 531-88-3437 |                 |
| SOMMERS    | ALLISON    | T  | 315-64-8671 |                 |

## **Browse Applicants Screen Controls**

### **Active and Inactive Buttons**

This pair of buttons allows you select the applicant database with which you want to work.

### **Sort By**

This set of radio buttons determines the order in which the applicant records are displayed in the table.

### **Search For**

This data field allows you to search for a specific applicant record. Enter the target of your search in this data field and click the Go button. The program searches whichever set of fields you have selected with the Search By radio buttons and highlights the first record in the table that matches your search target.

### **Add Button**

Click this button to add a new applicant. This process is described in more detail on the following pages.

### **Edit/Review Button**

Click this button to review and/or edit the currently selected applicant. This opens the Maintain Applicants screen on that applicant's record. This screen is described in more detail on the following pages.

## **Adding a New Applicant**

To add a new applicant, click the Add button on the Browse Applicants screen. The Add Applicant wizard opens. For more information on the Add Applicant wizard, see the Applicant List Tasks chapter of this manual.

# MAINTAIN APPLICANTS SCREEN

The Maintain Applicants screen contains the complete data for one selected applicant record. It has six tabs: Applicant, Lists Applied For, Application Activity, Change Tracking, Unit Offers/Vouchers., and Print Activity. This screen always opens on the Applicant tab, as shown below.

## Applicant Tab

The Applicant tab contains the selected applicant's identifying information, as well as all information on his initial application. It has five sub-tabs, each of which corresponds to one part of the standard printed application that Applicant List can produce. This tab always opens on the Part 1 sub-tab, as shown below.

The screenshot shows the 'Maintain Applicants' window. At the top, the 'Applicant' tab is selected, showing the applicant ID '492-19-4294' and the name 'BABCOCK, JOHN T'. Below this is a toolbar with various icons. The main form contains the following fields:

- Social Security #: 492-19-4294
- Assigned Identifier: BLLQ6DCJ
- First, MI, Last Name: JOHN T BABCOCK
- Street Address: 806 LINCOLN ST. APT. B
- City, State, Zip: LEXINGTON KY 40512
- Home Telephone: (859)276-5171
- Work Telephone: (859)641-5214
- Message Telephone: ( ) -
- Management Code: (dropdown menu)
- Caseworker: DIRRAL, LUCAS
- Last Contact Date: 9/27/2001

On the right side, there is a 'Household Summary' box with the following information:

- Total Income: 9597
- Household Size: 4
- Dependents: 2, Minors: 0
- Size Classification: Family
- Age Qualification: Near Elderly
- ☒ Disabled/Handicap

At the bottom, there is a table with the following data:

| Waiting List           | Bedrooms | Effective Date | Status                        | Pref. Wgt. |
|------------------------|----------|----------------|-------------------------------|------------|
| PUBLIC HOUSING, LIST A | 1        | 9/18/2001      | ACTIVE ON WAITING LIST        | 2          |
| SECTION 8, LIST A      | 1        | 10/27/2001     | SEARCHING FOR HOUSING WITH SE | 6          |

At the very bottom, there are six sub-tabs: 'Application - Part 1', 'Application - Part 2', 'Application - Part 3', 'Application - Part 4', 'Application - Part 5', and 'Application - Part 6'.

## Applicant Tab Controls

### Generate Form Letters Button

This button starts the Generate Form Letter wizard for the current tenant. For more information on this wizard, see the Form Letters in WinTen<sup>2</sup> manual.



### Show Form Letters Button

This button opens the Printed Documents sub-screen. This sub-screen, described at the end of this chapter, allows you to audit the form letters that have been printed for the selected applicant.



## Applicant Tab Print/Preview Options

The Print and Print Preview buttons on the Applicant tab have four printing options specific to this tab.



### Blank Application

This option prints a blank application form.

### Completed Summary Application

This option prints a summary application form with the detailed information of the selected applicant.

### Release of Information Form HUD-9886

This option prints Form HUD-9886, the Release of Information form used for Public Housing and most Section 8 programs.

### Release of Information Form HUD-9887

This option prints Form HUD-9887, the Release of Information form used for multi-family housing and some Section 8 programs.

## Applicant Tab Tasks

The Other Functions button allows you to perform the following task on the Applicant tab:

### Edit Applicant Details

When you select this option, a dialog box appears that asks you to select a data area to use for rent estimation. Select a data area from the drop-down selection box and click OK. The Applicant Detail sub-screen opens. This sub-screen contains detailed information on the applicant's household and financial status that is used for rent calculation in the WinTen<sup>2</sup> Occupancy and Rent Calculation program. See the Applicant Detail Sub-Screen portion of this chapter (p. 78) for more information.



### Hint: Data Area Selection

*When you select the Edit Applicant Details option from the Other Functions menu, the program performs a rent calculation for the selected applicant. The data area you select determines which housing program to use for the rent calculation.*

## Application - Part 1 Sub-Tab

The Application - Part 1 sub-tab contains the applicant's general identifying and contact information, as well as data on his household composition. Use the standard WinTen<sup>2</sup> controls to edit the data on this sub-tab and save or cancel your changes.

### Application - Part 1 Sub-Tab Data Fields

#### Social Security #

This is the applicant's Social Security number.

#### Assigned Identifier

This is a unique eight-character identifier that Applicant List assigned to the selected applicant record when the record was created. You cannot edit this field.

#### First, MI, Last Name

These three fields are the applicant's first name, middle initial, and last name.

#### Street Address

This is the applicant's current street address.

#### City, State & Zip

These three fields are the applicant's current city, state, and zip code.

#### Home Telephone

This is the applicant's home telephone number.

#### Work Telephone

This is the applicant's work telephone number.

#### Message Telephone

This is the applicant's primary contact telephone number, if it differs from his home and work numbers.

#### Management Code

This drop-down selection box allows you to set a management code for the applicant. The available options are the management codes defined on the Management Codes tab of the Setup screen.

#### Caseworker

This drop-down selection box allows you to select the caseworker who is assigned to assist this applicant. The available options are the caseworkers defined on the Maintain Caseworkers sub-screen of the Setup screen.

#### Last Contact Date

This is the date on which your agency last had contact with this applicant.

The screenshot shows the 'Maintain Applicants' window with the 'Application - Part 1' sub-tab selected. The applicant is BABCOCK, JOHN T. with Social Security # 492-19-4294 and Assigned Identifier BLLOSDCJ. The address is 806 LINCOLN ST, APT. B, LEXINGTON, KY 40512. Contact information includes Home Telephone (859)276-5171, Work Telephone (859)641-5214, and Message Telephone ( ) -. The Management Code is DIRRAL, LUCAS. The Last Contact Date is 9/27/2001. A Household Summary box shows Total Income 9597, Household Size 4, Dependents 2, Minors 0, Size Classification Family, and Age Qualification Near Elderly. A table at the bottom lists waiting list items: PUBLIC HOUSING, LIST A (1 bedroom, 9/18/2001, ACTIVE ON WAITING LIST, Pref. Wgt. 2) and SECTION 8, LIST A (1 bedroom, 10/27/2001, SEARCHING FOR HOUSING WITH SE, Pref. Wgt. 6). The bottom navigation bar shows tabs for Application - Part 1 through Application - Part 6.

#### Hint: What's a management code used for?

*Management codes are user-defined codes for sorting and filtering applicant records. You can attach a single management code to any applicant record. This allows you to sort applicant records by management code, and to filter reports so they only show applicants with a selected management code.*

## *Household Summary*

### **Total Income**

This is the total yearly income of the applicant's household.

### **Household Size**

This is the number of individuals in the applicant's household.

### **Dependents**

This is the number of dependents in the applicant's household.

### **Minors**

This is the number of minors in the applicant's household.

### **Size Classification**

This drop-down selection box allows you to indicate whether the household is a single individual, a couple, or a family.

### **Age Qualification**

This drop-down selection box allows you to indicate whether the applicant is an adult, near elderly status, or elderly.

### **Disabled/Handicap**

If any member of the applicant's household is disabled or handicapped, check this box.

### *Waiting List Table*

This table shows the waiting lists that the applicant is currently on. The table displays the name of each waiting list, the bedroom size of unit that the applicant applied for, the applicant's effective date of placement on that waiting list, and his status and preference weight (if any) on the list.

### **Hint: Near Elderly**

*"Near Elderly" age status is "close to age 62." How close depends on your agency's own policies on what constitutes "near elderly" - there is no official age range for this qualification.*

### **Hint: Disabled vs. Requested Accessibility**

*Not all disabled individuals request handicapped-accessible units. For instance, some wheelchair-bound applicants may have professional bodybuilder household members who can carry them and their wheelchairs up stairs. For this reason, the Applicant List program makes "disabled household members" and "applicant requested a handicapped-accessible unit" different items of data. To record the latter instance, switch to the Part 2 sub-tab.*

## Application - Part 2 Sub-Tab

The Application - Part 2 sub-tab contains more demographic information on the applicant and his household. Use the standard WinTen<sup>2</sup> controls to edit the data on this sub-tab and save or cancel your changes.

The screenshot shows the 'Maintain Applicants' window with the 'Application - Part 2' sub-tab selected. The applicant's ID is 492-19-4294 and the name is BABCOCK, JOHN T. The sub-tab is labeled 'Applicant'. The form contains the following fields and options:

- Applicant:** 492-19-4294, BABCOCK, JOHN T
- Sub-tabs:** Applicant (selected), Lists Applied For, Application Activity, Change Tracking, Unit Offers / Vouchers
- Toolbar:** Includes icons for file operations, navigation, and printing.
- Form Fields:**
  - Birthdate:** 2/06/1960
  - Gender:** Male
  - Race:** ☒ White, ☐ Black/African American, ☐ American Indian/Alaska Native, ☐ Asian, ☐ Native Hawaiian/Other Pacific Islander
  - Ethnicity:** Not Hispanic or Latino
  - Eligibility:** Eligible Citizen
  - Community Service Met:** N/A
  - Emancipated minor:** ☐
  - Homeless:** ☐
  - Displaced (about to be w/o hsg due to government action):** ☐
  - Has anyone ever been convicted of a crime?:** ☐
  - Has the applicant requested accessibility features?:** ☒
    - Vision:** ☐
    - Hearing:** ☐
    - Wheelchair:** ☐
    - Physical:** ☐
- Pet Information:**
  - Number of Cats:** 0
  - Number of Dogs:** 0
  - Number of Other Pets:** 1
  - Comments:** iguana, stays caged

The bottom of the window shows a series of tabs: Application - Part 1, Application - Part 2 (selected), Application - Part 3, Application - Part 4, Application - Part 5, and Application - Part 6.

## Application - Part 2 Sub-Tab Data Fields

### **Birthday**

This is the applicant's date of birth.

### **Emancipated Minor**

If the applicant is an emancipated minor, check this box.

### **Gender**

This drop-down selection box allows you to specify the applicant's gender.

### **Race**

This set of check boxes allows you to specify the applicant's racial composition.

### **Ethnicity**

This drop-down selection box allows you to specify the applicant's ethnicity.

### **Eligibility**

This drop-down selection box allows you to specify the applicant's eligibility for subsidized housing.

### **Community Service Met**

This drop-down selection box allows you to specify the applicant's community service compliance, if applicable.

### **Homeless**

If the applicant is currently homeless, check this box.

### **Displaced**

If the applicant is currently displaced, check this box.

### **Has anyone ever been convicted of a crime?**

If anyone in the applicant's household has been convicted of a crime that would render them ineligible to participate in a subsidized housing program (e.g. any felony, drug-related misdemeanor, etc.), check this box.

### **Has the applicant requested accessibility features?**

If the applicant has requested a handicapped-accessible unit, check this box.

## *Pet Information*

### **Number of Cats/Dogs/Other Pets**

These three data fields allow you to specify the number of cats, dogs, or other pets that the applicant has.

### **Comments**

This is a short (40-character) comment field for additional information on the applicant's pet situation.

### **Hint: Race**

*If you check more than one box, the WinTen<sup>2</sup> programs mark the applicant as multi-racial for HUD reporting purposes.*

## Application - Part 3 Sub-Tab

The Application - Part 3 sub-tab contains information on the applicant's current or most recent housing situation. Use the standard WinTen<sup>2</sup> controls to edit the data on this sub-tab and save or cancel your changes.

Hint: Part 3

*All data on the Application - Part 3 sub-tab is for informational purposes only. It is not required for HUD reporting.*

**Maintain Applicants**

Applicant: **492-19-4294** **BABCOCK, JOHN T**

Applicant | Lists Applied For | Application Activity | Change Tracking | Unit Offers / Vouchers

Mailing Address

Address: SAME AS PART 1

City, State, Zip: LEXINGTON KY 40512

Current Housing

Lived There From: [ ] To: [ ]

Bedrooms: 1 Rent Amount: 535

Moving Reasons: ☐ w/o Housing ☐ Sub-Standard ☒ Other, please explain

Explanation: BUILDING SOLD, NEW OWNER NOT A SECTION 8 PARTICIPANT

Current Landlord

Name: MARCUS STANTON

Address: 1554 MODRON WAY

City, State, Zip: LEXINGTON KY 40515

Telephone: (859)355-4517

Application - Part 1 | Application - Part 2 | Application - Part 3 | Application - Part 4 | Application - Part 5 | Application - Part 6

## Application - Part 3 Sub-Tab Data Fields

### *Mailing Address*

#### **Address**

This is the applicant's current or most recent street address.

#### **City, State, Zip**

These three fields are the applicant's current or most recent city, state, and zip code.

### *Current Housing*

#### **Lived There From ... To**

These fields are the dates between which the applicant has lived in his current or most recent home.

#### **Bedrooms**

This is the number of bedrooms in the applicant's current or most recent home.

#### **Rent Amount**

This is the applicant's current or most recent monthly rent.

#### **Moving Reasons**

These three check boxes allow you to specify the applicant's reason(s) for moving. Check all that apply.

#### **Explanation**

This is a description (up to 60 characters) of the applicant's reason(s) for moving.

### *Current Landlord*

#### **Name**

This is the name of the applicant's current or most recent landlord.

#### **Address**

This is the landlord's street address.

#### **City, State, Zip**

These three fields are the landlord's city, state, and zip code.

#### **Phone**

This is the landlord's phone number.

## Application - Part 4 Sub-Tab

The Application - Part 4 sub-tab contains information on the applicant's previous housing situation and current utility deposits. Use the standard WinTen<sup>2</sup> controls to edit the data on this sub-tab and save or cancel your changes.

### Hint: Part 4

*All data on the Application - Part 4 sub-tab is for informational purposes only. It is not required for HUD reporting.*

**Maintain Applicants**

Applicant: **492-19-4294** **BABCOCK, JOHN T**

Applicant | Lists Applied For | Application Activity | Change Tracking | Unit Offers / Vouchers

Utility Deposits

|                  |  |        |   |
|------------------|--|--------|---|
| Gas Company      |  | Amount | 0 |
| Electric Company |  | Amount | 0 |
| Water Company    |  | Amount | 0 |

Previous Address

Address: 5046 HANDLEY ST. #2

City, State, Zip: LOUISVILLE KY 40291

Lived There From: [ ] To: [ ]

Bedrooms: 0 Rent Amount: 0

Previous Landlord

Name: MONIQUE DUCHAMP

Address: 8428 EASUM RD.

City, State, Zip: LOUISVILLE KY 40299

Telephone: (502)585-6413

Application - Part 1 | Application - Part 2 | Application - Part 3 | **Application - Part 4** | Application - Part 5 | Application - Part 6

## Application - Part 4 Sub-Tab Data Fields

### *Utility Deposits*

These three fields are the names of the utility companies with which the applicant currently has deposits and the amounts of those deposits.

### *Previous Address*

#### **Address**

This is the applicant's previous street address.

#### **City, State, Zip**

These three fields are the applicant's previous city, state, and zip code.

#### **Lived There From ... To**

These fields are the dates between which the applicant lived in his previous home.

### *Previous Landlord*

#### **Name**

This is the name of the applicant's previous landlord.

#### **Address**

This is the landlord's street address.

#### **City, State, Zip**

These three fields are the landlord's city, state, and zip code.

#### **Phone**

This is the landlord's phone number.

## Application - Part 5 Sub-Tab

The Application - Part 5 sub-tab contains information on the applicant's previous public housing residency. Use the standard WinTen<sup>2</sup> controls to edit the data on this sub-tab and save or cancel your changes.

Hint: Part 5

*All data on the Application - Part 5 sub-tab is for informational purposes only. It is not required for HUD reporting.*

### Application - Part 5 Sub-Tab Data Fields

#### Ever lived in a Public Housing Authority

If the applicant has ever lived in a public housing authority before, check this box.

#### Name

This is the name of the agency in whose jurisdiction the applicant previously lived.

#### Address

This is the street address of the previous agency.

#### City, State, Zip

These three fields are the city, state, and zip code of the previous agency.

#### Lived There From ... To

These fields are the dates during which the applicant lived in the previous agency's jurisdiction.

**Maintain Applicants**

Applicant **492-19-4294** **BABCOCK, JOHN T**

Applicant | Lists Applied For | Application Activity | Change Tracking | Unit Offers / Vouchers

☐ Ever lived in a Public Housing Authority

Prior Public Housing Authority

Name

Address

City, State, Zip

Telephone ( ) -

Lived There From  To

Application - Part 1 | Application - Part 2 | Application - Part 3 | Application - Part 4 | Application - Part 5 | Application - Part 6

## Application - Part 6 Sub-Tab

The Application - Part 6 sub-tab contains information on conditions that might make the applicant ineligible to receive housing subsidies. Use the standard WinTen<sup>2</sup> controls to edit the data on this sub-tab and save or cancel your changes.

### Application - Part 6 Sub-Tab Data Fields

The Application - Part 6 sub-tab has four questions, each with a check box and a text field. If the answer to a given question is “yes,” check the corresponding box and enter a short explanation in the corresponding data field.

#### Hint: Part 6

*All data on the Application - Part 6 sub-tab is for informational purposes only. It is not required for HUD reporting.*

The screenshot shows the 'Maintain Applicants' window. At the top, the 'Applicant' field contains '492-19-4294' and the 'Name' field contains 'BABCOCK, JOHN T'. Below these are tabs for 'Applicant', 'Lists Applied For', 'Application Activity', 'Change Tracking', and 'Unit Offers / Vouchers'. The 'Applicant' tab is selected. A toolbar with various icons is located below the tabs. The main area is titled 'Program Integrity' and contains four questions, each with a checkbox and a text field for the answer:

- ☐ Has anyone in your household been arrested or convicted for the felonious use, sale, manufacture, or distribution of controlled substances (drugs)?  
If yes: Who? When? For What?
- ☐ Does anyone in your household currently use a controlled or illegal drug?  
If yes, please explain.
- ☐ Has anyone in your household ever been arrested or convicted of a violent criminal activity?  
If yes: Who? When? For What?
- ☐ Does anyone outside of your household pay for any of your bills or expenses?  
If yes: Who? When? For What?

At the bottom of the window are tabs for 'Application - Part 1', 'Application - Part 2', 'Application - Part 3', 'Application - Part 4', 'Application - Part 5', and 'Application - Part 6'. The 'Application - Part 6' tab is currently selected.

# Lists Applied For Tab

An applicant for subsidized housing can have multiple applications active on different waiting lists. The Lists Applied For tab contains data on every waiting list that the selected applicant is currently on. The top of the tab is a table which shows the applicant's waiting list applications. The bottom of the tab shows the detailed information for the currently selected waiting list application.

Some of the data fields on this tab are editable. These are the data fields that are informational only. Use the standard WinTen<sup>2</sup> controls to edit this data and save or cancel your changes.

Some other data fields on this tab are not editable through the standard WinTen<sup>2</sup> controls, but can be changed through use of options on this tab's Other Functions menu. In general, if an item has the potential to change the applicant's position on the waiting list, or if changing it is a separate auditable action, editing it requires the use of an Other Functions option.

**Maintain Applicants**

Applicant **492-19-4294** **BABCOCK, JOHN T**

Applicant | **Lists Applied For** | Application Activity | Change Tracking | Unit Offers / Vouchers

| Waiting List           | Bedrooms | Effective Date | Status                        | Pref. Wgt. |
|------------------------|----------|----------------|-------------------------------|------------|
| PUBLIC HOUSING, LIST A | 1        | 09/18/2001     | ACTIVE ON WAITING LIST        | 2          |
| SECTION 8, LIST A      | 1        | 10/27/2001     | SEARCHING FOR HOUSING WITH SE | 6          |

Waiting List: **SECTION 8, LIST A** Open Offer/Voucher

Bedrooms: **1**

Application #: **0000000008**

Status Code: **SEARCHING FOR HOUSING WITH SECTION 8 VOU**

Income Level: **E**

Pref. Weight: **6**

Application Date / Time

Effective Date: **10/27/2001**

Effective Time: **00:00:00**

Original Date: **09/17/2001**

Original Time: **13:34:00**

☒ Lives in County ☐

☒ Works in County ☐

☐ Homeless ☐

☒ Veteran ☐

☐ ☐

☐ ☐

☐ ☐

☐ ☐

☐ ☐

☐ ☐

## Lists Applied For Tab Tasks

The Other Functions button allows you to perform the following tasks on the Applicant tab:

### Apply to Waiting List

To process the applicant's addition to a specific waiting list, select this option. The Apply to Waiting List wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Change Application Date

To change the effective date of an applicant's application to a given waiting list, select this option. The Change Application Date/Time wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Change Bedrooms

To change the number of bedrooms for which an applicant has applied on a given waiting list, select this option. The Change Bedroom Size wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Make Offer

To make a unit offer to an applicant who is on a non-Section 8 waiting list, select this option. The Make Unit Offer wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Issue Voucher

To issue a voucher to an applicant who is on a Section 8 waiting list, select this option. The Issue Voucher wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Remove from Waiting List

To remove an applicant from a given waiting list, select this option. The Remove from Waiting List wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Mark as Ineligible

To mark an applicant as ineligible for a given waiting list, select this option. The Mark as Ineligible wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### House Applicant

To house (move in) an applicant, select this option. The House Applicant wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.



**Hint:** What's the difference between removing an applicant and marking him as ineligible?

*The program has two separate functions to take an applicant off a waiting list. Tenmast separates these for audit purposes. If an applicant doesn't want to be on a waiting list (including a data entry error that accidentally added him to the wrong list), remove him. If he can't legally be on a waiting list, mark him as ineligible.*

# Lists Applied For Tab Data Fields

## Waiting List

This is the waiting list that the currently selected application is on. You cannot edit this field.

## Bedrooms

This is the number of bedrooms that the applicant has requested in this application. You must use the Change Bedrooms Other Function to edit this field.

## Application #

This is the application number for this application.

## Status Code

This drop-down selection box allows you to specify the status code for this application.

## Income Level

This is the applicant's income level: Low, Very Low, or Extremely Low. You cannot edit this field; the program calculates it automatically based on the applicant's income data.

## Pref. Weight

This is the applicant's preference weight for this application. You cannot edit this field; the program calculates it automatically based on the preference check boxes selected at the bottom of the tab.

## Application Date/Time

### Effective Date

This is the effective date of the application. You must use the Change Application Date Other Function to edit this field.

### Effective Time

This is the effective time of the application. You must use the Change Application Date Other Function to edit this field.

### Original Date

This is the original (submitted) date of the application.

### Original Time

This is the original (submitted) time of the application.

## Preferences

This set of check boxes allows you to specify the applicant's preferences that apply on this waiting list.

The screenshot shows the 'Maintain Applicants' window with the 'Lists Applied For' tab selected. The applicant is BABCOCK, JOHN T. (ID: 492-19-4294). The table below shows the waiting lists applied for:

| Waiting List           | Bedrooms | Effective Date | Status                        | Pref. Wgt |
|------------------------|----------|----------------|-------------------------------|-----------|
| PUBLIC HOUSING, LIST A | 1        | 09/18/2001     | ACTIVE ON WAITING LIST        | 2         |
| SECTION 8, LIST A      | 1        | 10/27/2001     | SEARCHING FOR HOUSING WITH SE | 6         |

Below the table, the 'Waiting List' is set to 'SECTION 8, LIST A'. The 'Bedrooms' field is 1. The 'Application #' is 0000000008. The 'Status Code' is 'SEARCHING FOR HOUSING WITH SECTION 8 YOU'. The 'Income Level' is E. The 'Pref. Weight' is 6. The 'Application Date / Time' is 10/27/2001 00:00:00. The 'Effective Date' is 09/17/2001. The 'Original Date' is 13:34:00. The 'Original Time' is 13:34:00. The 'Open Offer/Voucher' button is highlighted in yellow. At the bottom, there are checkboxes for 'Lives in County', 'Works in County', 'Homeless', and 'Veteran', all of which are checked.

## Hint: At a Glance

If the applicant has an open unit offer or voucher for the selected waiting list, a note to this effect appears highlighted in yellow above the Application Date/Time data field group.

# Application Activity Tab

The Application Activity tab allows you to audit the application changes performed on the selected applicant's record. Every time you use a function that has the potential to change the applicant's position on a waiting list, the program records the date and time of this action and the login name of the individual who used it.

The Application Activity tab is divided into three sub-tabs: General, Additional, and Preferences. It always opens on the General sub-tab, as shown on the following page.

The screenshot shows the 'Maintain Applicants' window with the 'Application Activity' tab selected. The applicant is BABCOCK, JOHN T. (ID: 492-19-4294). The table below lists the application activity:

| Action Date | Action Performed          | Waiting List           |
|-------------|---------------------------|------------------------|
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | CHANGE BEDROOM SIZE       | PUBLIC HOUSING, LIST A |

Below the table, the 'Waiting List' is set to 'PUBLIC HOUSING, LIST A' and 'Bedrooms' is '1'. The 'Action Date' is '9/17/2001', 'Action Performed' is 'APPLY TO WAITING LIST', and 'Status Before Action' is 'ACTIVE ON WAITING LIST'. The 'Processed Date / Time' is '9/19/2001 13:15:07' by 'CAO'. The 'Voided' status is 'No'.

## Application Activity Tab Print/Preview Options

The Print and Print Preview buttons on the Application Activity tab have three printing options specific to this tab.

### All Activity in Date Order

This option prints a list of all recorded actions in the selected tenant's record, in order of effective date and time.

### From Currently Selected Date Forward

This option prints a list of all recorded actions in the selected tenant's record, from the selected action's date and time to the present, in order of effective date and time.

### Detail for Selected Activity

This option prints the detailed record for the currently selected action.



## General Sub-Tab

The top half of the General sub-tab contains a table of all change actions that the program has recorded for the selected applicant's record. The bottom half of the sub-tab contains general data on the currently selected action. You cannot edit the data on this sub-tab - it is for informational purposes only.

**Maintain Applicants**

Applicant: **492-19-4294**    **BABCOCK, JOHN T**

Applicant | Lists Applied For | **Application Activity** | Change Tracking | Unit Offers / Vouchers

Table of Actions:

| Action Date | Action Performed          | Waiting List           |
|-------------|---------------------------|------------------------|
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | CHANGE BEDROOM SIZE       | PUBLIC HOUSING, LIST A |

Waiting List: **PUBLIC HOUSING, LIST A**    Bedrooms: **1**

Action Date: **9/17/2001**

Action Performed: **APPLY TO WAITING LIST**

Status Before Action: **ACTIVE ON WAITING LIST**

Processed Date / Time: **9/19/2001**    **13:15:07**    By: **CAO**

Voided: **No**    On:    By:

General | **Additional** | Preferences

## General Sub-Tab Data Fields

### Waiting List

This is the waiting list that the selected action affected.

### Bedrooms

This is the number of bedrooms that the applicant applied for on the affected waiting list.

### Action Date

This is the action's effective date.

### Action Performed

This is a short description of the action.

### Status Before Action

This is the applicant's waiting list status before the action was processed.

### Processed Date/Time ... By

These fields indicate the date and time at which the request was entered and the user name of the individual who entered it.

### Voided ... On ... By

These fields indicate whether or not the action has been voided. If it has been, they also display the date on which it was voided and the user name of the individual who voided it.

### Hint: Bedrooms

*If the selected action was a Change Bedroom Size request, the value in the Bedrooms field is the number of bedrooms which the applicant had requested before the program processed the change.*

## Additional Sub-Tab

The top half of the Additional sub-tab contains a table of all change actions that the program has recorded for the selected applicant's record. The bottom half of the sub-tab contains extra data on the currently selected action. You cannot edit the data on this sub-tab - it is for informational purposes only.

**Maintain Applicants**

Applicant **492-19-4294** **BABCOCK, JOHN T**

Applicant | Lists Applied For | **Application Activity** | Change Tracking | Unit Offers / Vouchers

| Action Date | Action Performed          | Waiting List           |
|-------------|---------------------------|------------------------|
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | CHANGE BEDROOM SIZE       | PUBLIC HOUSING, LIST A |

Original Date / Time: 9/17/2001 13:34:00

Effective Date / Time: 9/17/2001 13:34:00

Application Number: 0000000002

Income Level: E

Data Area: SECTION 8 ON H:\ALPHEXE\S8

Tenant Type: Public Housing

Date Housed:

General | **Additional** | Preferences

## **Additional Sub-Tab Data Fields**

### **Original Date/Time**

This is the date and time at which the applicant's data was first entered into the Applicant List program.

### **Effective Date/Time**

This is the date and time at which the applicant was placed on the waiting list that the selected action affects.

### **Application Number**

This is the applicant's application number on the waiting list that the selected action affects.

### **Income Level**

This is the applicant's income level: Low, Very low, or Extremely low.

### **Data Area**

This is the data area in which the waiting list's data is stored.

### **Tenant Type**

This is the tenant type that this applicant will be if he is housed through this waiting list.

### **Date Housed**

This is the date on which the applicant was housed, if he has been housed yet.

## Preferences Sub-Tab

The top half of the Preferences sub-tab contains a table of all change actions that the program has recorded for the selected applicant's record. The bottom half of the sub-tab contains a list of all preferences that are set up for the waiting list that the currently selected action affects. The check boxes indicate which preferences are set for the applicant. The Total Preference Weight field at the bottom of the sub-tab indicates the applicant's total preference weight on the affected waiting list. You cannot edit the data on this sub-tab - it is for informational purposes only.

**Maintain Applicants**

Applicant **492-19-4294**    **BABCOCK, JOHN T**

Applicant   Lists Applied For   **Application Activity**   Change Tracking   Unit Offers / Vouchers

| Action Date | Action Performed          | Waiting List           |
|-------------|---------------------------|------------------------|
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | REMOVE PER TENANT REQUEST | PUBLIC HOUSING, LIST A |
| 9/17/2001   | APPLY TO WAITING LIST     | PUBLIC HOUSING, LIST A |
| 9/19/2001   | CHANGE BEDROOM SIZE       | PUBLIC HOUSING, LIST A |

☒ Lives in County  
☒ Works in County  
☐ Homeless  
☒ Veteran  
☐  
☐  
☐  
☐  
☐  
☐

☐  
☐  
☐  
☐  
☐  
☐  
☐  
☐  
☐  
☐

Total Preference Weight **6**

General   **Additional**   Preferences

# Change Tracking Tab

The Change Tracking tab contains a complete log of every editing change that has been made to the selected applicant record since it was first entered into the program. None of the data on this tab is editable; it is here for informational purposes only. The top portion of the tab contains the table of changes. The bottom portion of the tab contains the detailed information for the currently selected change record.

Maintain Applicants

Applicant492-19-4294BABCOCK, JOHN T

ApplicantLists Applied ForApplication ActivityChange TrackingUnit Offers / Vouchers

| Waiting List           | Date      | Operation | Description               |
|------------------------|-----------|-----------|---------------------------|
|                        | 9/17/2001 | NEW       | NEW                       |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | RMV       | REMOVE PER TENANT REQUEST |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | RMV       | REMOVE PER TENANT REQUEST |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | RMV       | REMOVE PER TENANT REQUEST |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | BRC       | CHANGE BEDROOM SIZE       |
| PUBLIC HOUSING, LIST A | 9/19/2001 | BRC       | CHANGE BEDROOM SIZE       |

OperationNEW

InitialsCAD

Date9/17/2001

Time15:35:34

Waiting List

DescriptionNEW

Action Date9/17/2001

Other Data492-19-4294

## Change Tracking Tab Print/Preview Options



The Print and Print Preview buttons on the Application Activity tab have two printing options specific to this tab.

### Change Tracking Log in Date Order

This option prints the entire change tracking log for the selected applicant, sorted by date and time of change.

### Change Tracking Log Selected Date Forward

This option prints the change tracking log for the selected applicant, from the selected change record to the present date and time, sorted by date and time of change.

## Change Tracking Tab Data Fields

### Operation

This is the operation that occurred during the selected change.

### Initials

This is the initials or user ID of the individual who performed the selected change.

### Date

This is the date of the change.

### Time

This is the time of the change.

### Waiting List

This is the waiting list application that the change affected.

### Description

This is a brief description of the change that occurred.

### Old Value

This is the value of the data that was changed, as it was before the change.

### New Value

This is the value of the data that was changed, as it was after the change.

The screenshot shows the 'Maintain Applicants' window with the 'Change Tracking' tab selected. The window displays a table of change tracking records for applicant 'BABCOCK, JOHN T'. The table has columns for 'Waiting List', 'Date', 'Operation', and 'Description'. Below the table, there are input fields for 'Operation', 'Initials', 'Date', 'Time', 'Waiting List', 'Description', 'Action Date', and 'Other Data'.

| Waiting List           | Date      | Operation | Description               |
|------------------------|-----------|-----------|---------------------------|
|                        | 9/17/2001 | NEW       | NEW                       |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | RMV       | REMOVE PER TENANT REQUEST |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | RMV       | REMOVE PER TENANT REQUEST |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | RMV       | REMOVE PER TENANT REQUEST |
| PUBLIC HOUSING, LIST A | 9/19/2001 | APP       | APPLY TO WAITING LIST     |
| PUBLIC HOUSING, LIST A | 9/19/2001 | BRC       | CHANGE BEDROOM SIZE       |
| PUBLIC HOUSING, LIST A | 9/19/2001 | BRC       | CHANGE BEDROOM SIZE       |

Operation: NEW  
Initials: CAQ  
Date: 9/17/2001  
Time: 15:35:34  
Waiting List:   
Description: NEW  
Action Date: 9/17/2001  
Other Data: 492-19-4294

The Unit Offers/Vouchers tab contains information on every Section 8 voucher and public housing offer that has been issued to the selected applicant. The top area of this tab contains a table of all vouchers and offers and the bottom area of the tab contains the detailed information on the currently selected voucher or offer.

| Maintain Applicants    |            |                   |          |                      |        |                 |
|------------------------|------------|-------------------|----------|----------------------|--------|-----------------|
| Applicant              |            | 492-19-4294       |          |                      |        |                 |
| Applicant              |            | BABCOCK, JOHN T   |          |                      |        |                 |
| Applicant              |            | Lists Applied For |          | Application Activity |        | Change Tracking |
| Unit Offers / Vouchers |            |                   |          |                      |        |                 |
|                        |            |                   |          |                      |        |                 |
| Waiting List           | Offer Date | Unit / Voucher    | Response | Response Date        | Voiced |                 |
| PUBLIC HOUSING, LIST A | 9/25/2001  | 002               |          |                      | No     |                 |
| SECTION 8, LIST A      | 9/26/2001  | 1504515           | Expired  | 9/27/2001            | No     |                 |
| SECTION 8, LIST A      | 9/27/2001  | 611654            |          |                      | No     |                 |
| Voucher Information    |            |                   |          |                      |        |                 |
| Waiting List           |            | SECTION 8, LIST A |          | Issued               |        | 9/26/2001       |
| Data Area              |            | MS8               |          | Expires              |        | 11/25/2001      |
| Voucher Number         |            | 1504515           |          | Project Number       |        | KY132V00002     |
| Bedrooms               |            | 1                 |          |                      |        |                 |
| Address                |            |                   |          |                      |        |                 |
| City, State, Zip       |            |                   |          |                      |        |                 |
| Voucher Disposition    |            |                   |          |                      |        |                 |
| Date / Time            |            | 9/27/2001         |          | 00:00                |        |                 |
| Initials               |            | CAO               |          |                      |        |                 |
| How                    |            | Other             |          |                      |        |                 |
| Result                 |            | Expired           |          |                      |        |                 |
| Void Information       |            |                   |          |                      |        |                 |
| Voiced                 |            | No                |          |                      |        |                 |
| by                     |            |                   |          |                      |        |                 |
| on                     |            |                   |          |                      |        |                 |

## Unit Offer/Vouchers Tab Print/Preview Options



The Print and Print Preview buttons on the Unit Offers/Vouchers tab have two printing options specific to this tab.

### Offers Listing

This option produces a complete history of every offer and/or voucher that has been extended to the selected applicant.

### Voucher (Reprint Only)

This option produces a fresh copy of a selected voucher that has been issued previously.

## Unit Offers/Vouchers Tab Tasks

### Accept Offer

To record the applicant's acceptance of a unit offer, select this option. The Accept Offer wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Reject Offer

To record the applicant's rejection of a unit offer, select this option. The Reject Offer wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Extend Voucher

To extend an active voucher, select this option. The Extend Voucher wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Expire Voucher

To manually expire an active voucher, select this option. The Expire Voucher wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### House Applicant

To house (move in) an applicant, select this option. The House Applicant wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.



## Unit Offers/Vouchers Tab Data Fields

Some of the data fields on this tab change name depending on whether a voucher or a housing offer is currently selected. A field with a dual name is indicated with the name it has when a voucher is selected, a slash (/), and the name it has when a housing offer is selected.

## *Voucher Information/Housing Offer Information*

### **Waiting List**

This is the waiting list on which the voucher was issued or the offer was made.

### **Issued/Offered**

This is the date on which the voucher was issued or the offer was made.

### **Expires**

This is the date the voucher or offer expires.

### **Address**

This is the address of the unit in question.

### **Data Area**

This is the data area that contains the data on the unit in question.

### **Voucher Number/Unit Number**

This is the number of the issued voucher or the offered unit.

### **Bedrooms**

This is the number of bedrooms for which the voucher applies or that are in the offered unit.

### **Project Number**

This field is only available if a voucher is selected. It is the number of the project for which the voucher was issued.

## *Voucher Disposition/Unit Offer Response*

### **Date**

This is the date on which the voucher was finalized or the applicant responded to the unit offer.

### **Time**

This is the time at which the voucher was finalized or the applicant responded to the unit offer.

### **How**

This is the manner in which the applicant responded to the unit offer or finalized the voucher.

### **Result**

This is the end result of the applicant's response to the unit offer or finalizing action on the voucher.

### **Initials**

These are the initials of the user who recorded the response or disposal.

## *Void Information*

### **Voided ... by ... on**

These three fields indicate if the selected voucher or offer has been voided, and, if so, the initials of the user who voided it and the date on which it was voided.

# Printed Documents Sub-Screen

This sub-screen contains a table of every form letter that has been printed for the selected applicant, and data fields containing the detailed information on the selected document. It also allows you to record the details of responses to these letters for audit purposes. Use the standard WinTen<sup>2</sup> controls to edit the data on this tab and save or cancel your changes.

Printed Documents

File Edit Actions View

| Document Description         | Print Date | Due Date | Received | Additional Description         |
|------------------------------|------------|----------|----------|--------------------------------|
| Applicant Asset Verification | 9/26/2002  |          |          | JOHN T BABCOCK / 246-41-1327 / |
| Applicant Asset Verification | 9/26/2002  |          |          | JOHN T BABCOCK / 261-56-4133 / |

Document Description

Applicant Asset Verification

Date / Time Created

9/26/2002

16:09

Created By

BR

Date / Time Printed

9/26/2002

16:09

Printed By

CAO

Additional Description

JOHN T BABCOCK / 246-41-1327 / FIFTH THIRD BANK

Response

Due Date

Date / Time

Received From

Method

Received By

## Printed Documents Sub-Screen Data Fields

### *Document Details*

You cannot edit the document detail data fields. These are set when the document is printed.

#### **Document Description**

This is the title of the selected document.

#### **Date/Time Created**

These are the initials of the user who created the document.

#### **Created By**

These are the initials of the user who created the document.

#### **Date/Time Printed**

These are the initials of the user who printed the document.

#### **Printed By**

These are the initials of the user who printed the document.

#### **Additional Description**

This is additional data that the program saves to identify the document.

### *Response*

#### **Due Date**

This is the date by which a response to the document is due.

#### **Date/Time**

These are the date and time at which your agency received a response to the document.

#### **Received From**

This is the name of the individual or organization from whom the response came.

#### **Method**

This drop-down selection box allows you to specify the method by which the respondent responded.

#### **Received By**

This is the name of the user who received the response.

# Applicant Detail Sub-Screen

The Applicant Detail sub-screen contains detailed household and financial information on the selected applicant. It has seven tabs: Main, Household, Income, Assets, Expenses, References, and Totals. The Applicant Detail sub-screen always opens on the Main tab.

If you use the WinTen<sup>2</sup> Occupancy and Rent Calculation module, this sub-screen and its tabs may look very familiar. This is because they contain the same information as their respective counterparts on the Tenant Detail screen of Occupancy and Rent Calculation. When you move this applicant into a unit, Applicant List will transfer his records to Occupancy and Rent Calculation. This saves you the work of entering the information on the Applicant Detail screen a second time.

Applicant Detail

File Edit Tools Help

Head Name JOHN T BABCOCKHead SSN 492-19-4294Effective Date 1/01/1999

MainHouseholdIncomeAssetsExpensesReferencesTotals

SSN 492-19-4294

Head First NameJOHN

Middle InitialT

Head Last NameBABCOCK

Account #

TTP117

Tenant Rent117

Tenant TypeP - Public Housing

Trans Code

Exam Date

Project #

Action

Effective Date1/01/1999

Application Date9/17/2001

Bedrooms0

Caseworker

Tenant DetailRent Calculations

# Main Tab

The Main tab contains general information about the tenant. It is divided into two sub-tabs: Tenant Detail and Rent Calculations. This tab always opens on the Tenant Detail sub-tab, as shown on the next page.

## Main Tab Controls

### Recalculate Totals Button

When you click the Recalculate button, the program recalculates the applicant's projected rent based on any changes you have made to his data since the last time the program calculated his projected rent.



### Edit SSN Button

When you click the Edit SSN button, the applicant's Social Security number becomes editable. If you change the SSN and click the Save button, the program updates all of its databases to match.



### Special Message Button

The Special Message button allows you to insert a short special message into the tenant's record. This special message shows up highlighted in bright yellow in the upper right corner of the Tenant Detail sub-tab.



### Generate Form Letters Button

This button starts the Generate Form Letter wizard for the current tenant. For more information on this wizard, see the Form Letters in WinTen<sup>2</sup> manual.



### Show Form Letters Button

This button opens the Printed Documents sub-screen. This sub-screen allows you to audit the form letters that have been printed for the selected applicant.



## Tenant Detail Sub-Tab

The Tenant Detail sub-tab contains general tenant information. Some fields on this screen may change depending on the setting of the Tenant Type drop-down selection box.

The screenshot shows a software window titled "Applicant Detail". At the top is a menu bar with "File", "Edit", "Tools", and "Help". Below the menu bar is a header section containing "Head Name JOHN T BABCOCK", "Head SSN 492-19-4294", and "Effective Date 1/01/1999". A tabbed interface below the header shows "Main", "Household", "Income", "Assets", "Expenses", "References", and "Totals", with "Main" being the active tab. A toolbar with various icons is located below the tabs. The main form area displays the SSN "492-19-4294" and input fields for "Head First Name" (JOHN), "Middle Initial" (T), and "Head Last Name" (BABCOCK). To the right of these fields is an "Account #" field. Below the name fields are two status indicators: "TTP 117" and "Tenant Rent 117". Further down are several dropdown menus and text fields: "Tenant Type" (set to "P - Public Housing"), "Trans Code", "Exam Date", "Project #", "Action", "Effective Date" (set to "1/01/1999"), "Application Date" (set to "9/17/2001"), and "Bedrooms" (set to "0"). At the bottom left is a "Caseworker" field. At the very bottom of the window are two buttons: "Tenant Detail" (which is highlighted with a dashed border) and "Rent Calculations".

## Tenant Detail Sub-Tab Data Fields

### SSN

This is the Social Security number of the head of the household. You cannot edit this field normally. To change the applicant's SSN, click the Edit SSN button.

### Head First Name

This is the first name of the head of the household.

### Middle Initial

This is the middle initial of the head of the household.

### Head Last Name

This is the last name of the head of the household.

**Account #**

This field is for housing authority internal use only. You can enter whatever data you need in this field. Many agencies use this for the account number used to track the applicant/tenant.

**TTP**

This is the currently projected TTP (Total Tenant Payment) for this household. The program calculates this field; you cannot edit it.

**Tenant Rent**

This is the currently projected tenant rent for this household. The program calculates this field; you cannot edit it.

**Tenant Type**

This drop-down selection box allows you to specify the applicant's type in terms of subsidized housing programs. The fields on the screen may change depending on the tenant type you select.

**Project #**

This drop-down selection box allows you to select the applicant's project number. The options here are the projects that are set up on the Project Validation tab of the Occupancy and Rent Calculation program's Setup screen. This option is available only if the applicant is marked as a voucher-based tenant type.

**Trans Code**

This drop-down selection box allows you to select the trans(action) code that best describes any reason for a change being made to the tenant record. This selection is critical to accurate PIC-50058 and TRACS reporting.

**Action**

This drop-down box allows you to select the action code that best describes the change being made in the tenant record. This is primarily used for TRACS reporting, but it is required for all tenant types.

**Action B**

This drop-down box allows you to select the secondary action code for the change being made in the tenant record. This field is only available if the applicant is marked as a Section 236, New Construction, Section 202, Section 811, Section 221d BMIR, or Rural Development tenant type.

**Exam Date**

This is the date of the examination associated with the transaction code.

### Effective Date

This is the effective date of the transaction code you have selected for this tenant.

### HAP Contract

This is the number of the applicant's HAP contract. This field is only available if the applicant is marked as a Section 8 Certificate, Section 8 Voucher, Housing Choice Voucher, or Section 8 Mod Rehab tenant type.

### Voucher Size

This is the bedroom size for the voucher that has been issued to the applicant. This field is only available if the applicant is marked as a Section 8 Certificate, Section 8 Voucher, Housing Choice Voucher, or Section 8 Mod Rehab tenant type.

### Bedrooms

This drop-down selection box allows you to specify how many bedrooms the unit has. Select 0 for an efficiency apartment.

### Application Date

This is the date on which the tenant applied for housing assistance.

### Caseworker

This is the name of the tenant's caseworker.

The screenshot shows the 'Applicant Detail' window in the WinTen2 software. The window has a menu bar (File, Edit, Tools, Help) and a toolbar with various icons. Below the menu bar, there's a header section with 'Head Name: JOHN T BABCOCK', 'Head SSN: 492-19-4294', and 'Effective Date: 1/01/1999'. A tabbed interface is present with tabs for 'Main', 'Household', 'Income', 'Assets', 'Expenses', 'References', and 'Totals'. The 'Main' tab is active, displaying a form with the following fields: SSN (492-19-4294), Unit #, Building, Entrance #, Head First Name (JOHN), Middle Initial (T), Head Last Name (BABCOCK), Phone (659)276-5171, Street (806 LINCOLN ST. APT. B), City (LEXINGTON), State (KY), Zip (40512), Account #, TTP (25), and Tenant Rent (25). There are also dropdown menus for Tenant Type (P - Public Housing), Project #, Trans Code, Action, and Bedrooms (0). The Application Date is set to 9/17/2001. At the bottom, there's a 'Caseworker' field and two buttons: 'Tenant Detail' and 'Rent Calculations'.

## Rent Calculations Sub-Tab

The Rent Calculation sub-tab allows you to perform a rent calculation for a new applicant. The data fields on the bottom half of this tab will change, depending on the Tenant Type selected on the Tenant Detail sub-tab. This manual will discuss the fields that do not change first, and then examine those which are specific to the program settings.

| Applicant Detail                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                  |                                                   |                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|---------------------------------------------------|--------------------------|
| File Edit Tools Help                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                  |                                                   |                          |
| Head Name JOHN T BABCOCK                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                  | Head SSN 492-19-4294                              | Effective Date 1/01/1999 |
| Main   Household   Income   Assets   Expenses   References   Totals                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                  |                                                   |                          |
|          |                                                                  |                                                   |                          |
| Percent <input type="text" value="30"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Household Size 4                                                 |                                                   |                          |
| Subsidy <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Dependents 2                                                     |                                                   |                          |
| Second Subsidy? <input type="checkbox"/> Continuous Assistance <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Eligible Members 4                                               |                                                   |                          |
| Housing Assistance <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Welfare Rent <input type="text" value="0"/>                      | Elderly Household <input type="checkbox"/>        |                          |
| Low Income Limit <input type="text" value="0"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Security Deposit <input type="text" value="0"/>                  |                                                   |                          |
| Very Low Limit <input type="text" value="0"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Earning Based on Handicap Expense <input type="text" value="0"/> |                                                   |                          |
| Extremely Low Limit <input type="text" value="0"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | TTP 25                                                           | Minimum Rent Exempt <input type="checkbox"/>      |                          |
| Current Income Level <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Utility Allowance <input type="text" value="0"/>                 | Repayment Agreement <input type="checkbox"/>      |                          |
| Previous Level <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Tenant Rent 25                                                   | Monthly Repayment <input type="text" value="0"/>  |                          |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                  | Ceiling Rent <input type="text" value="0"/>       |                          |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                  | Indian Travel Cost <input type="text" value="0"/> |                          |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                  | Flat Rent <input type="text" value="0"/>          |                          |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                  | Flat Rent Chosen <input type="checkbox"/>         |                          |
| Tenant Detail   Rent Calculations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                  |                                                   |                          |

## Rent Calculation Sub-Tab Data Fields

### Common Data Fields

#### Percent

This is the percentage of adjusted gross income used for the rent calculation. Under most circumstances, this will be 30.00.

#### Subsidy

This drop-down selection box allows you to select the appropriate subsidy code.

#### Second Subsidy

If the applicant is receiving a subsidy of another type, check this box.

#### Continuous S8

Check this box if the household was already receiving some form of housing subsidy when they were enrolled in their current program.

#### Housing Assist

This drop-down selection box allows you to select the appropriate code for this applicant's housing assistance status.

#### Lower Limit

This is the lower income level limit for this applicant.

#### Very Low Limit

This is the very low income level limit for this applicant.

#### Income Level

This is the applicant's current income level. Use "V" for very low or "L" for low income level.

#### Old Income Level

This is the applicant's previous income level, if it is different from the current one.

#### Household Over 62

If the head of the household or the head's spouse is over 62, check this box.

#### Payment Std/FMR

This field's label changes, depending on whether the applicant is a public housing applicant or a Section 8 applicant. If this is a public housing applicant, this is the applicant's payment standard. If this is a Section 8 applicant, this is the unit's fair market rent.

#### Base Rent/Note Rent

This field's label changes depending on the applicant type. For most applicant types, this is the applicant's base rent. For applicants of type F (Rural Development), this is the applicant's note rent.

#### Hint: Continuous S8

*This is used to indicate that a applicant or household was already receiving some form of housing subsidy prior to entering the program in which they are currently enrolled, and they continued to receive housing subsidies under their new program with no un-subsidized transition period. For example, a applicant who was formerly enrolled in a Public Housing program but moved to Section 8 Homeownership would be considered a continuous Section 8 tenant.*

**Contract Rent**

If this is a Section 8 applicant, this is the monthly contract rent as established by the unit's owner. If this is not a Section 8 applicant, leave this field blank.

**Welfare Rent**

This is the applicant's welfare rent, if applicable.

**Utility Allowance**

This is the utility allowance for the unit. See the Setup chapter for more information on establishing utility allowances.

**Earning Ded/Handicap Expense**

This is the amount of income earned as a result of expenditures made by the applicant to overcome a handicap. For example, if a wheelchair-bound applicant spent \$1000 to modify a van so he could have transportation to and from a job, and now makes \$10,000/year more because of this job, this field should contain "10000."

**Handicap Expense**

This is the total amount of expenditures the applicant has made to overcome a handicap. Using the example above, this field would contain "1000."

**TTP**

Total Tenant Payment (TTP) is the amount that a household is responsible for paying to rent a unit. However, this is not necessarily the amount that the household actually pays. Some tenant types, like Section 8 Voucher tenants, use Total Family Contribution for the actual rent amount. Utility allowances can also affect the final payment amount. The program calculates this field; you cannot edit it.

**Utility Allowance**

This is the applicant's utility allowance.

**Tenant Rent**

This is the actual amount the household is responsible for paying. This reflects the TTP plus any utility allowances. If this field is negative, the household is entitled to a utility reimbursement.

**Minimum Rent Exempt**

Check this box if the applicant is exempt from the required minimum rent due to hardship.

**Repayment Agreement**

Check this box if a retroactive rent repayment agreement is set up for this applicant.

**Monthly Repayment**

If a retroactive repayment agreement is in place, this is the monthly amount the applicant owes toward that debt.

## Public/Indian Housing Applicant Data Fields

If the applicant is type P (Public Housing) or type I (Indian Housing), the following data fields are available on the Applicant Detail tab.

### Ceiling Rent

This is the unit's ceiling rent.

### Indian Travel Cost

This is the Indian travel cost for this applicant.

### Flat Rent

If your agency uses flat rents, this is the applicant's flat rent. If your agency does not use flat rents, leave this field blank.

### Flat Rent Chosen

If your agency uses flat rent regardless of any income based rent calculation, check this box.

### Flat Rent Re-Exam Date

This is the date of the applicant's next flat rent re-examination.

The screenshot shows the 'Applicant Detail' form for 'JOHN T BARCOCK'. The 'Household' tab is selected. Fields include: Percent (30), Subsidy (dropdown), Second Subsidy? (dropdown), Continuous Assistance (checkbox), Housing Assistance (dropdown), Welfare Rent (0), Household Size (4), Dependents (2), Eligible Members (4), Elderly Household (checkbox), Low Income Limit (0), Very Low Limit (0), Extremely Low Limit (0), Current Income Level (dropdown), Previous Level (dropdown), Security Deposit (0), Earning Based on Handicap Expense (0), TTP (25), Minimum Rent Exempt (checkbox), Utility Allowance (0), Repayment Agreement (checkbox), Monthly Repayment (0), Tenant Rent (25), Ceiling Rent (0), Indian Travel Cost (0), Flat Rent (0), and Flat Rent Chosen (checkbox). The bottom tabs are 'Tenant Detail' and 'Rent Calculations'.

## Section 8 Applicant Data Fields

If the applicant is type S (Section 8 Certificate), V (Section 8 Voucher), H (Housing Choice Voucher), or R (Section 8 Mod Rehab), the following data fields are available on the Rent Calculation sub-tab.

### Portable

If the applicant is a portability move-in from another housing authority and your agency is currently billing that housing authority, check this box. If the applicant is a portability move-in but your agency has absorbed the lease, do not check this box.

### Special Program

This drop-down selection box allows you to select the applicant's homeownership program participation, or lack thereof.

### Assistance Status

This drop-down selection box allows you to select the applicant's assistance status code.

### Rental Rehab?

If the unit is a Mod Rehab unit, check this box.

### Self-Sufficiency?

If the unit is self-sufficient, check this box.

**NOTE: This is not the same as FSS self-sufficiency.**

### Hard to House?

If the applicant is Hard to House, check this box.

**IGR**

If the applicant lives in an Individual Group Residence, check this box.

**Mobile Home Pad**

If the applicant lives in a mobile home which he owns but is leasing the space on which it is located, check this box.

**SRO**

If the applicant lives in a Single Room Occupancy unit, check this box.

**Mod Rehab**

If this is a certificate applicant whose subsidy is paid with Moderate Rehabilitation funding, check this box.

**Project-Based**

If the applicant lives in a project-based certificate program unit, check this box.

**Structure Type**

This drop-down selection box allows you to specify the type of structure in which the unit is located.

**Year Built**

This is the year in which the structure was built.

*Section 8 Voucher Applicant Data Fields*

If the applicant is type V (Section 8 Voucher), the following data field appears on the Rent Calculation sub-tab.

**Eliminate Shopping Incentive**

If the shopping incentive should be eliminated for this applicant, check this box.

**NOTE: Effective December 20, 1998, the shopping incentive was eliminated for voucher applicants who enter the program after that date and who are not taking possession of a new unit (e.g. they remained in the same unit they occupied prior to the issuance of the voucher).**

*Section 8 New Construction/Section 202/  
Section 236/Rural Development/Section 811/  
Section 221(d) Applicant Data Fields*

If the applicant is one of the types listed above, the following data fields are available on the Rent Calculation sub-tab.

### Contract Number

This is the applicant's contract number. This is the contract number against which your Request for HAP for this applicant will be billed.

### Date Code

Use one of the following codes to indicate when the applicant was converted:

- 1 Before October 1, 1981
- 2 Between October 1, 1981 and September 9, 1984
- 3 After October 1, 1984

### Worksheet

This is the one-letter code of the worksheet used for calculating this applicant's rent. Under most circumstances, this is worksheet E.

### Change Code

This field is for any change codes that apply to this applicant. These codes are used in conjunction with the Request for Funds Report (Form HUD-52670) for TRACS projects. If this is not a TRACS project, leave this field blank.

### Pref 59

This is the preference code used on the HUD Form 50059. This field is only used for TRACS applicants who are new admissions. The available codes are:

- D Displaced
- R Paying rent in excess of 50% of income
- S Substandard
- Blank No preference given

### FmHA Subsidy

This field indicates the type of FmHA subsidy that the applicant receives. It should only be completed for Rural Development applicants. The available codes are:

- 0 No Deep Tenant Subsidy
- 1 Rental Assistance (RA)
- 3 Existing HUD Certificates
- 4 Other Public RA
- 5 Private RA
- 6 HUD Vouchers
- 7 Other types at basic rent

### Hint: Date Code and "Converted"

*These terms are TRACS legalese. What the Date Code field boils down to is "when did this applicant enter the unit?" This dates back to the HURRA reforms in the late 1970s and early 1980s. For all new applicants, the Date Code field should be set to "3."*

**Sec. 8 on/after 1984**

If the applicant began receiving Section 8 assistance on or after October 4, 1984, check this box.

**Pre '81**

If the applicant moved into the unit prior to 1981, check this box.

**HURRA**

If the applicant's rent is still being calculated under the HURRA program, check this box.

**Previous**

This field only needs to be filled in for move-ins. It does not apply to Rural Development applicants, only to Section 8 applicants. This is the applicant's previous housing type. The available codes are:

- 1 Substandard Housing
- 2 Without or about to be without housing
- 3 Standard housing
- 4 Conventional public housing

**Displaced**

This field does not apply to Rural Development applicants, only to Section 8 applicants. The available codes are:

- 1 Government Displacement
- 2 Natural Disaster
- 3 Private Action
- 4 Not Displaced

**Exceptions**

This field is only used for new admissions. It reports any exceptions to low income qualification for this admission. The field will usually be marked "VL" because the applicant's income was very low at admission.

**Income Code**

This drop-down selection box allows you to select the income code that applies to this applicant. These codes are used in conjunction with the Request for Funds Report (Form HUD-52670) for TRACS projects. If this is not a TRACS project, leave this field blank.

**Hint: "Displaced"**

*This field is used to indicate the reason for the applicant's move into a Section 8 unit. Government Displacement is a result of government action (e.g. demolition of the applicant's previous unit). Natural Disaster is a result of a natural disaster (e.g. flood, fire, hurricane, tornado, plague of locusts, comet striking the Earth) that destroyed the applicant's previous unit. Private Action is a result of non-government action that rendered the applicant's previous unit unlivable. Not Displaced is used when the applicant was previously living in the same unit without rent assistance and then entered Section 8 while remaining in that unit.*

### *Managed Projects Applicant Data Fields*

If the applicant is a Managed Projects applicant, the following data fields are available on the Rent Calculation sub-tab.

#### **Maximum Rent 50% of Gross Income**

If the applicant cannot pay more than 50% of his gross income for rent, check this box.

#### **Minimum Rent**

This is the minimum rent applicable to this applicant.

### *State Project Applicant Data Fields*

If the applicant a State Project applicant, the following data fields are available on the Rent Calculation sub-tab.

#### **Elderly Program**

If the applicant is participating in the state project's Elderly Program, check this box. The applicant's rent calculations will change to reflect this.

#### **RAP Tenant**

If the applicant is participating in a Rental Assistance Program (RAP). The applicant's rent calculations will change to reflect this.

### *Tax Exempt Applicant Data Fields*

If the applicant is a Tax Exempt applicant, the following data field is available on the Rent Calculation sub-tab.

#### **Tenant Rent**

This is the applicant's rent rate.

The screenshot shows the 'Applicant Detail' window with the 'Rent Calculations' sub-tab selected. The form contains various input fields and checkboxes for rent calculations. Key fields include:

- Percent:** 30
- Subsidy:** [Dropdown menu]
- Second Subsidy?** [Dropdown menu]
- Housing Assistance:** [Dropdown menu]
- Welfare Rent:** 0
- Low Income Limit:** 0
- Very Low Limit:** 0
- Extremely Low Limit:** 0
- Current Income Level:** [Dropdown menu]
- Previous Level:** [Dropdown menu]
- Security Deposit:** 0
- Earning Based on Handicap Expense:** 0
- TTP:** 25
- Utility Allowance:** 0
- Tenant Rent:** 25
- Household Size:** 4
- Dependents:** 2
- Eligible Members:** 4
- Elderly Household:** [Checked]
- Minimum Rent Exempt:** [Unchecked]
- Repayment Agreement:** [Unchecked]
- Monthly Repayment:** 0
- Ceiling Rent:** 0
- Indian Travel Cost:** 0
- Flat Rent:** 0
- Flat Rent Chosen:** [Unchecked]

The bottom of the window shows tabs for 'Tenant Detail' and 'Rent Calculations'.

## Household Tab

The record for the head of a household is automatically created when you add an applicant record. This is the data that is displayed on the Main tab. The Household tab holds the data for every member of that applicant's household. The bottom portion of the tab contains a table of every household member in this applicant's household. The top portion of the tab shows the detailed information on the currently selected household member. You can add, edit, or delete household member records using the standard WinTen<sup>2</sup> controls.

**Applicant Detail**

File Edit Tools Help

Head Name GERALD T ASHMORE Head SSN 648-61-1381 Effective Date

Main Household Income Assets Expenses References Totals

First Name GERALD MI T Last Name ASHMORE SSN 648-61-1381 Member # 01

Relation to Head HEAD Dependent Type Head of HouseHold ☐ Handicap ☐ Disabled

Birthday 08/24/2001 Age 1 Birthplace

Sex Male Community Service Met Not Applicable

Race White

Ethnicity Non-Hispanic

Eligibility EC - Eligible Citizen

☐ Alien Registration Number

Alternate ID

☐ Been convicted of a crime ☐ Sold or given away property in the last two years

☐ Vision Impaired  
☐ Hearing Impaired  
☐ Wheelchair  
☐ Mentally Impaired  
☐ Physically Impaired  
☐ OXYGEN TANK  
☐ CAREGIVER ANIMAL

| SSN           | First Name | MI | Last Name | Dep Type | Sex | Birthday   | Age | Member # |
|---------------|------------|----|-----------|----------|-----|------------|-----|----------|
| ▶ 648-61-1381 | GERALD     | T  | ASHMORE   | H        | M   | 08/24/2001 | 1   | 01       |

## Household Tab Controls

### Renumber Household Button

This button rennumbers all members of this household. Household member numbers are used to track income and assets for the household.

### Change Head of Household Button

This button opens the Change Head of Household dialog box. This dialog box allows you to set any household member to be the head of this household. Select the household member you want and click OK, or click Cancel to cancel the change.

### Generate Form Letters Button

This button starts the Generate Form Letter wizard for the current tenant. For more information on this wizard, see the Form Letters in WinTen<sup>2</sup> manual.



## Household Tab Data Fields

### First Name

This is the household member's first name.

### MI

This is the household member's middle initial.

### Last Name

This is the household member's last name.

### SSN

This is the household member's Social Security number. If this household member is the head of the household, the program will fill in this field automatically.

### Member #

This is the individual's household member number. The program automatically updates this field.

### Relation to Head

This is the individual's relationship to the head of household.

### Dependent Type

This drop-down selection box allows you to choose the individual's dependency status, or lack thereof, with relation to the head of household. Choose the option that is the best match.

### Birthday

This is the household member's birthday.

### Age

This is the household member's age. The program automatically fills in this field.

### Birthplace

This is the household member's place of birth.

| SSN         | First Name | MI | Last Name | Dep Type | Sex | Birthday   | Age | Member # |
|-------------|------------|----|-----------|----------|-----|------------|-----|----------|
| 648-61-1381 | GERALD     | T  | ASHMORE   | H        | M   | 08/24/2001 | 1   | 01       |

### Hint: Infant SSNs

*If a household member is an infant who has not yet received a Social Security number, enter nine nines (999-99-9999) in this field. Change the field to the correct SSN once the child is assigned one.*

**Sex**

This drop-down selection box allows you to select the household member's gender.

**Community Service Met**

This drop-down selection box allows you to select the status of the household member's community service requirement compliance, if applicable.

**Race**

This drop-down selection box allows you to specify the household member's race. If you select "Multi-racial," a set of five check boxes appears on the tab. These allow you to select the household member's racial composition.

**Ethnicity**

This drop-down selection box allows you to specify the household member's ethnicity as Hispanic or Non-Hispanic.

**Eligibility**

This drop-down selection box allows you to specify the household member's eligibility status.

**Alien**

If the household member has alien residency status, check this box.

**Registration Number**

If the household member has alien residency status, this is his alien registration number. If he does not have this status, leave this field blank.

**Alternate ID**

If the household member has a HUD-assigned AID, enter it here.

**Been convicted of a crime**

If the household member has ever been convicted of a crime, check this box.

**Sold or given away property in the last two years**

If the household member has sold or given away property in the last two years, check this box.

**Handicap**

If the household member is handicapped, check this box. The set of ten check boxes immediately below this check box becomes usable. Use these check boxes to indicate which of the listed handicaps the household member is subject to.

**Disabled**

If the household member is disabled, check this box. The set of ten check boxes immediately below this check box becomes usable. Use these check boxes to indicate which of the listed disabilities the household member is subject to.

## Income Tab

The Income tab allows you to track sources of income for a applicant's household. The bottom portion of the tab contains a table of every income source in this applicant's household. The top portion of the tab shows the detailed information on the currently selected income source. You can add, edit, or delete income records using the standard WinTen<sup>2</sup> toolbar buttons.

**Applicant Detail**  
File Edit Tools Help

Head Name JOHN T BABCOCK      Head SSN 492-19-4294      Effective Date 1/01/1999

Main | Household | **Income** | Assets | Expenses | References | Totals

Income Owner JOHN T BABCOCK      Income Owner SSN 492-19-4294

Income Type **W - Wages and Salary**  
Start Date 8/01/2000  
Period **Hourly**      Amount 10  
Weeks per Year 50      Hours per Week 15  

Income Total 7500  
Income Excluded 0  
Income After Exclusions 7500  
Exclusion Ends

Employer KENSINGTON SALVAGE  
Position CRANE OPERATOR  
Address 5580 MEADOW BROOK RD  
City LEXINGTON      St KY  
Zip 40519      How Long 2 YRS  
Phone (859)624-1217

| SSN         | Name              | Member # | Income Type | Income Total | Employer           |
|-------------|-------------------|----------|-------------|--------------|--------------------|
| 492-19-4294 | JOHN T BABCOCK    | 01       | W           | 7500         | KENSINGTON SALVAGE |
| 426-16-4165 | MELINDA K BABCOCK | 02       | OB          | 1800         |                    |

## Income Tab Controls

### Insert/Edit Agency Button

This button opens the Agency Information dialog box. This dialog box allows you to create, edit, or delete agency records, as you would on the Maintain Outside Agencies sub-screen of the Setup screen. The left side of the dialog box contains a table of all agency records in the agency database. The right side shows the information for the currently selected agency. You can add, edit, or delete agency records with the standard WinTen<sup>2</sup> controls. To insert an agency's information into the current income record, select that agency and click the Insert Agency into Income Record button.



### Generate Form Letters Button

This button starts the Generate Form Letter wizard for the current tenant. For more information on this wizard, see the Form Letters in WinTen<sup>2</sup> manual.



## Income Tab Data Fields

### Income Owner

This drop-down selection box allows you to select which household member is responsible for this source of income. If you are not editing the currently selected income source, this appears as a non-editable data field, not a drop-down selection box.

### Income Owner SSN

This is the SSN of the income owner. The program automatically fills in this field.

### Income Type

This drop-down selection box allows you to select the appropriate type of income for this income source.

### Start Date

This is the date on which the household member began receiving this source of income.

### Period

This drop-down selection box allows you to specify whether the income source pays in yearly, monthly, weekly, or hourly increments.

### Amount

This is the amount of income per time period that the income source pays. For example, if you set the Period drop-down selection box to Monthly, this is the amount of money per month that the household member receives from this source.

### Hint: Multiple Income Sources

*You may only set one income type per income record. If a given household member has two or more separate sources of income, you must create a separate income record for each source.*

## Weeks per Year

This is the number of weeks per year that the household member receives income from this source. This data field is only visible if you set the Period drop-down selection box to Weekly or Hourly.

## Hours per Week

This is the number of hours of work per week for which the household member receives income from this source. This data field is only visible if you set the Period drop-down selection box to Hourly.

## Income Total

This is the total annual income that the household member earns from this source. The program automatically calculates this field; you cannot edit it.

## Income Excluded

This is the amount of earned income to exclude. Each income type has its own accepted amount of excludable income. This data field is only visible if the household is a Public or Indian Housing household.

## Income After Exclusions

This is the difference between the Income Total and Income Excluded fields. The program automatically calculates this field; you cannot edit it. This data field is only visible if the household is a Public or Indian Housing household.

## Exclusion Ends

This is the date on which the exclusion ends.

## Employer

This is the name of the employer or other entity from whom the household member receives this income.

## Position

This is the household member's job title, if applicable.

## Address, City, St, Zip

These four fields are the employer's address.

## How Long

This is the number of years that the household member has been receiving income from this employer.

## Phone

This is the employer's phone number.

The screenshot shows the 'Applicant Detail' window for John T Babcock. The 'Income' tab is selected, showing details for 'Income Owner JOHN T BABCOCK' with SSN 492-19-4294. The form includes fields for Income Type (W - Wages and Salary), Start Date (8/01/2000), Period (Hourly), Amount (10), Weeks per Year (50), Hours per Week (15), Income Total (7500), Income Excluded (0), Income After Exclusions (7500), Exclusion Ends, Employer (KENSINGTON SALVAGE), Position (CRANE OPERATOR), Address (5500 MEADOW BROOK RD), City (LEXINGTON), St (KY), Zip (40519), How Long (2 YRS), and Phone (859)624-1217. A table at the bottom lists income sources for two members.

| SSN         | Name              | Member # | Income Type | Income Total | Employer           |
|-------------|-------------------|----------|-------------|--------------|--------------------|
| 492-19-4294 | JOHN T BABCOCK    | 01       | W           | 7500         | KENSINGTON SALVAGE |
| 426-16-4165 | MELINDA K BABCOCK | 02       | OB          | 1800         |                    |

## Assets Tab

The Assets tab allows you to track the financial and material assets of an applicant's household. The bottom portion of the tab contains a table of every asset in this applicant's household. The top portion of the tab shows the detailed information on the currently selected asset. You can add, edit, or delete asset records using the standard WinTen<sup>2</sup> controls.

### Assets Tab Controls

#### Insert/Edit Agency Button

This button opens the Agency Information dialog box. This dialog box allows you to create, edit, or delete agency records, as you would on the Maintain Outside Agencies sub-screen of the Setup screen. The left side of the dialog box contains a table of all agency records in the agency database. The right side shows the information for the currently selected agency. You can add, edit, or delete agency records with the standard WinTen<sup>2</sup> controls. To insert an agency's information into the current asset record, select that agency and click the Insert Agency into Asset Record button.



**Agency Information**

Agency Name: SOCIAL SECURITY ADMINISTRATOR, FIFTH THIRD BANK, NATIONAL CITY BANK, UNIVERSITY OF KY. FEDERAL, LEXMARK INTERNATIONAL

**Insert Agency into Income Record**

Name: SOCIAL SECURITY ADMINISTRATOR  
 Care Of:   
 Address: 2260 EXECUTIVE DRIVE  
 City: LEXINGTON  
 State: KY  
 Zip: 40512  
 Phone: (859)294-5633

**Applicant Detail**

File Edit Tools Help

Head Name JOHN T BABCOCK Head SSN 492-19-4294 Effective Date 1/01/1999

Main | Household | Income | **Assets** | Expenses | References | Totals

Asset Owner THOMAS M BABCOCK Asset Owner SSN 246-41-1327

Description: TRUST FUND  
 Asset Value: 4500  
 Actual Income: 0  
 Imputed Income: 0

Source: FIFTH THIRD BANK  
 Contact:   
 Address: 250 WEST MAIN STREET  
 City: LEXINGTON St: KY  
 Zip: 40501  
 Phone: (859)455-5300

| SSN         | Name             | Asset Type | Asset Value | Actual Income |
|-------------|------------------|------------|-------------|---------------|
| 246-41-1327 | THOMAS M BABCOCK | TRUST FUND | 4500        | 0             |
| 261-56-4133 | ERIN C BABCOCK   | TRUST FUND | 4500        | 0             |

**Generate Form Letters Button**

This button starts the Generate Form Letter wizard for the current tenant. For more information on this wizard, see the Form Letters in WinTen<sup>2</sup> manual.



**Assets Tab Data Fields**

**Asset Owner**

This drop-down selection box allows you to select which household member is responsible for this asset.

**Asset Owner SSN**

This is the Social Security number of the asset owner. You cannot edit this field.

**Description**

This is a brief description of the asset.

**Asset Value**

This is the asset’s current value.

**Actual Income**

This is the actual annual income that the household member receives from this asset.

**Imputed Income**

According to HUD rules, an imputed income figure must be calculated and used in the applicant calculation for any asset with a value in excess of \$5,000. The program automatically calculates this number based on the imputed (passbook) interest rate you entered on the Default Settings tab of the Setup screen in Occupancy and Rent Calculation.

**Source**

This is the source or holder of the asset (e.g., if the asset is a savings account, enter the name of the bank that holds it).

**Contact**

This is the name of the contact person for questions or verification regarding the asset.

**Address, City, St, Zip**

These four fields are the asset source’s address.

**Phone**

This is the asset source’s phone number.

| SSN         | Name             | Asset Type | Asset Value | Actual Income |
|-------------|------------------|------------|-------------|---------------|
| 246-41-1327 | THOMAS M BABCOCK | TRUST FUND | 4500        | 0             |
| 261-56-4133 | ERIN C BABCOCK   | TRUST FUND | 4500        | 0             |

# Expenses Tab

The Expenses tab allows you to track the significant expenses incurred by an applicant's household. The bottom portion of the tab contains a table of every expense in this applicant's household. The top portion of the tab shows the detailed information on the currently selected expense. You can add, edit, or delete expense records using the standard WinTen<sup>2</sup> controls.

## Expenses Tab Controls

### Insert/Edit Agency Button

This button opens the Agency Information dialog box. This dialog box allows you to create, edit, or delete agency records, as you would on the Maintain Outside Agencies sub-screen of the Setup screen. The left side of the dialog box contains a table of all agency records in the agency database. The right side shows the information for the currently selected agency. You can add, edit, or delete agency records with the standard WinTen<sup>2</sup> controls. To insert an agency's information into the current expense record, select that agency and click the Insert Agency into Expense Record button.



Agency Information

Agency Name

- SOCIAL SECURITY ADMINISTR
- FIFTH THIRD BANK
- NATIONAL CITY BANK
- UNIVERSITY OF KY. FEDERAL
- LEXMARK INTERNATIONAL

Insert Agency into Income Record

Name: SOCIAL SECURITY ADMINISTR

Care Of:

Address: 2260 EXECUTIVE DRIVE

City: LEXINGTON

State: KY

Zip: 40512

Phone: (859)294-5633

**Applicant Detail**

File Edit Tools Help

Head Name JOHN T BABCOCK Head SSN 492-19-4294 Effective Date 1/01/1999

Main | Household | Income | Assets | Expenses | References | Totals

Expense Owner MELINDA K BABCOCK Expense Owner SSN 426-16-4165

Description: ANTIDEPRESSANTS

Expense Type: Medical Expense

Expense Period: Monthly

Cost Per Period: 120

Annual Cost: 1440

Payee:

Care Of:

Address:

City: St:

Zip:

Phone: ( ) -

| SSN         | Name              | Description       | Expense Type | Period | Cost | Cost per Year |
|-------------|-------------------|-------------------|--------------|--------|------|---------------|
| 426-16-4165 | MELINDA K BABCOCK | ANTIDEPRESSANTS   | M            | M      | 120  | 1440          |
| 492-19-4294 | JOHN T BABCOCK    | CHIROPRACTIC CARE | M            | M      | 200  | 2400          |

**Generate Form Letters Button**

This button starts the Generate Form Letter wizard for the current tenant. For more information on this wizard, see the Form Letters in WinTen<sup>2</sup> manual.



**Expenses Tab Data Fields**

**Expense Owner**

This drop-down selection box allows you to select the household member responsible for this expense.

**Expense Owner SSN**

This is the Social Security number of the expense owner. The program automatically displays this field; you cannot edit it.

**Description**

This is a brief description of the expense.

**Expense Type**

This drop-down selection box allows you to indicate the general type of the expense.

**Expense Period**

This drop-down selection box allows you to indicate whether the expense is weekly, monthly, or annual.

**Cost per Period**

This is the expense’s per-period cost.

**Annual Cost**

This is the expense’s annual cost. The program calculates this based on the expense period and cost per period that you have set; you cannot edit this field.

**Payee**

This is the individual or agency that receives payment for this expense.

**Care Of**

This is the name of the contact person for questions or verification regarding the expense.

**Address, City, St, Zip**

These four fields are the payee’s address.

**Phone**

This is the payee’s phone number.

| SSN         | Name              | Description       | Expense Type | Period | Cost | Cost per Year |
|-------------|-------------------|-------------------|--------------|--------|------|---------------|
| 426-16-4165 | MELINDA K BABCOCK | ANTIDEPRESSANTS   | M            | M      | 120  | 1440          |
| 492-19-4294 | JOHN T BABCOCK    | CHIROPRACTIC CARE | M            | M      | 200  | 2400          |

# References Tab

The References tab enables you to create and maintain a list of financial and personal references for each applicant household. The bottom portion of the tab contains a table of every reference in this applicant's household. The top portion of the tab shows the detailed information on the currently selected reference. You can edit reference records using the standard WinTen<sup>2</sup> controls.

## References Tab Controls

### Generate Form Letters Button

This button starts the Generate Form Letter wizard for the current tenant. For more information on this wizard, see the Form Letters in WinTen<sup>2</sup> manual.



Applicant Detail

File Edit Tools Help

Head Name JOHN T BABCOCKHead SSN 492-19-4294Effective Date 01/01/1999

MainHouseholdIncomeAssetsExpensesReferencesTotals

Reference TypeBank Reference 1

Reference Name

Address

City, State, Zip

Phone ( ) -

Checking Acct #Savings Acct #

| Reference Type       | Reference Name | Phone |
|----------------------|----------------|-------|
| Bank Reference 1     |                | ( ) - |
| Bank Reference 2     |                | ( ) - |
| Credit Reference 1   |                | ( ) - |
| Credit Reference 2   |                | ( ) - |
| Credit Reference 3   |                | ( ) - |
| Personal Reference 1 |                | ( ) - |
| Personal Reference 2 |                | ( ) - |
| Personal Reference 3 |                | ( ) - |

## References Tab Data Fields

### Reference Type

This is the reference's type: bank, credit, or personal.

### Reference Name

This is the name of the reference, whether an individual or a financial institution.

### Address, City, State, Zip

These four fields are for the reference's full mailing address.

### Phone

This is the reference's phone number.

### Checking Acct #

This is the number of the tenant's checking account with this reference, if applicable.

### Savings Acct #

This is the number of the tenant's savings account with this reference, if applicable.

**Applicant Detail**  
File Edit Tools Help  
Head Name JOHN T BARDOCK Head SSN 492-19-4294 Effective Date 01/01/1999

Main | Household | Income | Assets | Expenses | **References** | Totals

Reference Type Bank Reference 1  
Reference Name  
Address  
City, State, Zip  
Phone ( ) -  
Checking Acct # Savings Acct #

| Reference Type       | Reference Name | Phone |
|----------------------|----------------|-------|
| Bank Reference 1     |                | ( ) - |
| Bank Reference 2     |                | ( ) - |
| Credit Reference 1   |                | ( ) - |
| Credit Reference 2   |                | ( ) - |
| Credit Reference 3   |                | ( ) - |
| Personal Reference 1 |                | ( ) - |
| Personal Reference 2 |                | ( ) - |
| Personal Reference 3 |                | ( ) - |



The upper left area of the tab displays household assets and income information. This data is drawn from the Income and Assets tabs.

The lower left area of the tab displays expense, allowance, and deduction information. This data is drawn from the Household tab (for disabled, handicapped, and elderly statuses of individual household members) and the Expense tab (for medical, childcare, and permissible deduction allowances, as well as household expenses).

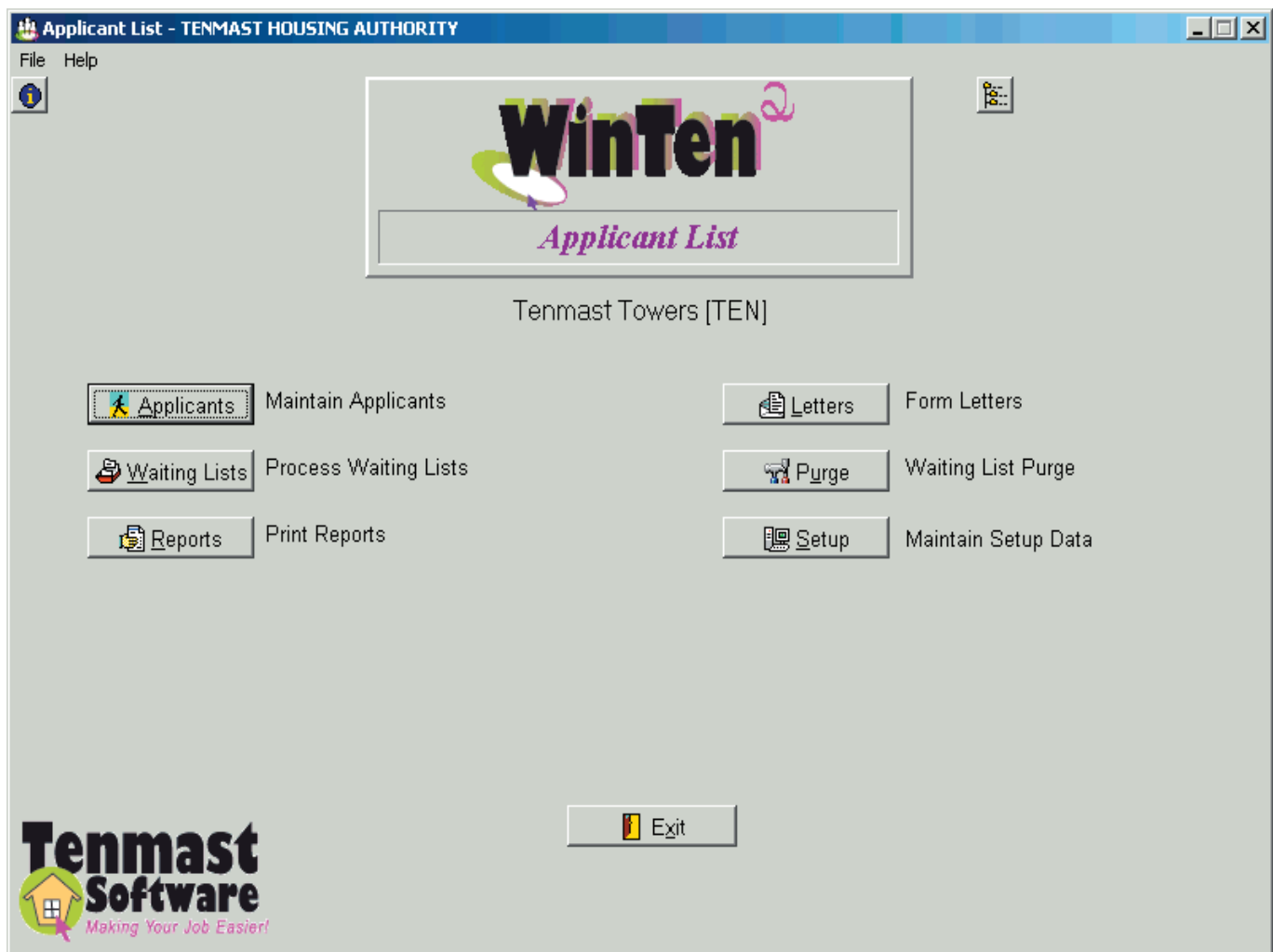
The right area of the tab displays total income, allowances, annual adjusted income, and monthly adjusted income. The program calculates these figures from the asset, income, and expense information displayed in the lower left area of the tab. It also uses data from the Rent Calculation sub-tab of the Main tab.

The lower right area of the tab displays the rent calculation data for the applicant.

| Applicant Detail           |           |                      |                                   |
|----------------------------|-----------|----------------------|-----------------------------------|
| File Edit Tools Help       |           |                      |                                   |
| Head Name JOHN T BARCOCK   |           | Head SSN 492-19-4294 | Effective Date 1/01/1999          |
| Main                       | Household | Income               | Assets Expenses References Totals |
|                            |           |                      |                                   |
| Actual Assets              |           | 9000                 | Total Annual Income 9597          |
| Actual Asset Income        |           | 0                    | Total Allowance 960               |
| Imputed Income from Assets |           | 297                  | Annual Adjusted Income 9597       |
| Total Wages                |           | 9300                 | Monthly Adjusted Income 390       |
| Total SS                   |           | 0                    |                                   |
| Total PA                   |           | 0                    | 10 % of Monthly Total Income 80   |
| Total Other Income         |           | 0                    | 30% of Monthly Adjusted Income 0  |
| Income Total               |           | 9300                 | Welfare Rent 0                    |
| Less Income Exclusions     |           | 0                    | Minimum Rent 25                   |
| Asset Income               |           | 297                  | The Largest of the 4 is TTP 25    |
| Total Annual Income        |           | 9597                 |                                   |
| 3% of Annual Income        |           | 288                  | Utility Allowance 0               |
| Permissible Deductions     |           | 0                    | Tenant Rent 25                    |
| Handicapped Expenses       |           | 0                    |                                   |
| Allowance for Dependents   |           | 960                  |                                   |
| Elderly/Disabled Allowance |           | 0                    | Utility Reimbursement 0           |
| Medical Allowance          |           | 0                    |                                   |
| Child Care Allowance       |           | 0                    |                                   |
| Total Allowances           |           | 960                  |                                   |

# PROCESS WAITING LISTS

The core purpose of the Applicant List program is to track the application records of the individuals who have applied for subsidized housing within your agency's jurisdiction. This job has two aspects: individual applicant records and waiting lists. The Process Waiting Lists area of the program allows you to review and edit the data on specific waiting lists and the applicants on them. To access this area of functionality, click the Waiting Lists button or press <W> at the Main Menu.



# PROCESS WAITING LIST SCREEN

The Process Waiting List screen allows you to re-view the applications on a selected waiting list and perform processing actions on them. The screen is divided into three sections. The top section allows you to select the waiting list that you want to view. The middle section is a table of all applications on the selected waiting list, and it allows you to select one application to view or process. The bottom section contains the detailed data for the currently selected application.

Process Waiting List

Waiting List

PUBLIC HOUSING, LIST A

Search For

Go

Waiting List Order

Number of Beds; Descending Preference Weight; Application Date/Time

Bedrooms

1

Income Targeting

On Target

Applied "Singles" Rule

Show ...

☒ Applicants of All Income Ranges
   
☐ Extremely Low Income Applicants

| Rank | Pref. Wt. | Application Date/Time | Inc. Level | Household Size | Singles Rule | Applicant          | Beds |
|------|-----------|-----------------------|------------|----------------|--------------|--------------------|------|
| 1    | 4         | 08/02/2001 11:27:00   | E          | 1              |              | KIM, MARISSA P     | 1    |
| 2    | 4         | 08/24/2001 09:37:00   | E          | 1              |              | STEPHENS, GEORGE D | 1    |
| 3    | 2         | 09/18/2001 13:34:00   | E          | 4              |              | BABCOCK, JOHN T    | 1    |

Caseworker

Pets

Home Phone

Work Phone

Message Phone

Application Num

0000000022

Displaced / Homeless

No

/

No

Dependents / Minors

0

/

0

Disabled or Handicapped?

No

Requested Accessibility Features?

No

Status Code

ACCEPTED

Management Code

RETURNING

## Process Waiting List Screen Tasks



### Edit Applicant

To edit the selected applicant's data, select the Edit Applicant function from the Other Functions menu. This opens the Maintain Applicants screen on the selected applicant's record. This screen functions exactly as described in the previous chapter. Some task options may not be available.

### House Applicant

To house (move in) an applicant, select this option. The House Applicant wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Issue Voucher

To issue a voucher to an applicant who is on a Section 8 waiting list, select this option. The Issue Voucher wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

### Make Unit Offer

To make a unit offer to an applicant who is on a non-Section 8 waiting list, select this option. The Make Unit Offer wizard opens. For more information on this wizard, see the Applicant List Tasks chapter of this manual.

## Process Waiting List Screen Data Fields

### *Waiting List*

#### Waiting List

This drop-down selection box allows you to specify the waiting list whose data is shown on this screen.

#### Search For

This data field allows you to search for an applicant by last name. Enter the last name (or first few letters of the last name) and click the Go button. The table of applicants moves to the first matching entry.

#### Waiting List Order

This is the order in which the currently selected waiting list is sorted.

#### Bedrooms

This field allows you to select the number of bedrooms requested on the selected waiting list. It is not available if the waiting list is a Section 8 waiting list.

## Income Targeting

This field shows whether income targeting goals are being met on the selected waiting list. It is not available if the waiting list is not set up for income targeting tracking.

If the Singles Rule is applied to this waiting list, a message to this effect appears to the right of the Income Targeting field.

## Show

This pair of radio buttons allows you to set the table of applicants to show all applicants or only applications with extremely low household income levels.

## *Application*

## Caseworker

This is the name of the caseworker assigned to the applicant, if any.

## Pets

This field details the applicant's pets, if any.

## Home Phone

This is the applicant's home phone number.

## Work Phone

This is the applicant's work phone number.

## Message Phone

This is the applicant's message phone number.

## Application Num

This is the applicant's application number.

## Homeless/Displaced

These fields indicate whether or not the applicant is currently homeless or displaced.

## Dependents/Minors

These fields are the numbers of dependents and minors that the applicant has in his household.

## Disabled or Handicapped?

This field indicates whether or not the applicant has disabled/handicapped status.

## Requested Accessibility Features?

This field indicates whether or not the applicant has requested a unit with disabled/handicapped access.

## Status Code

This is the applicant's current status code on this waiting list.

## Management Code

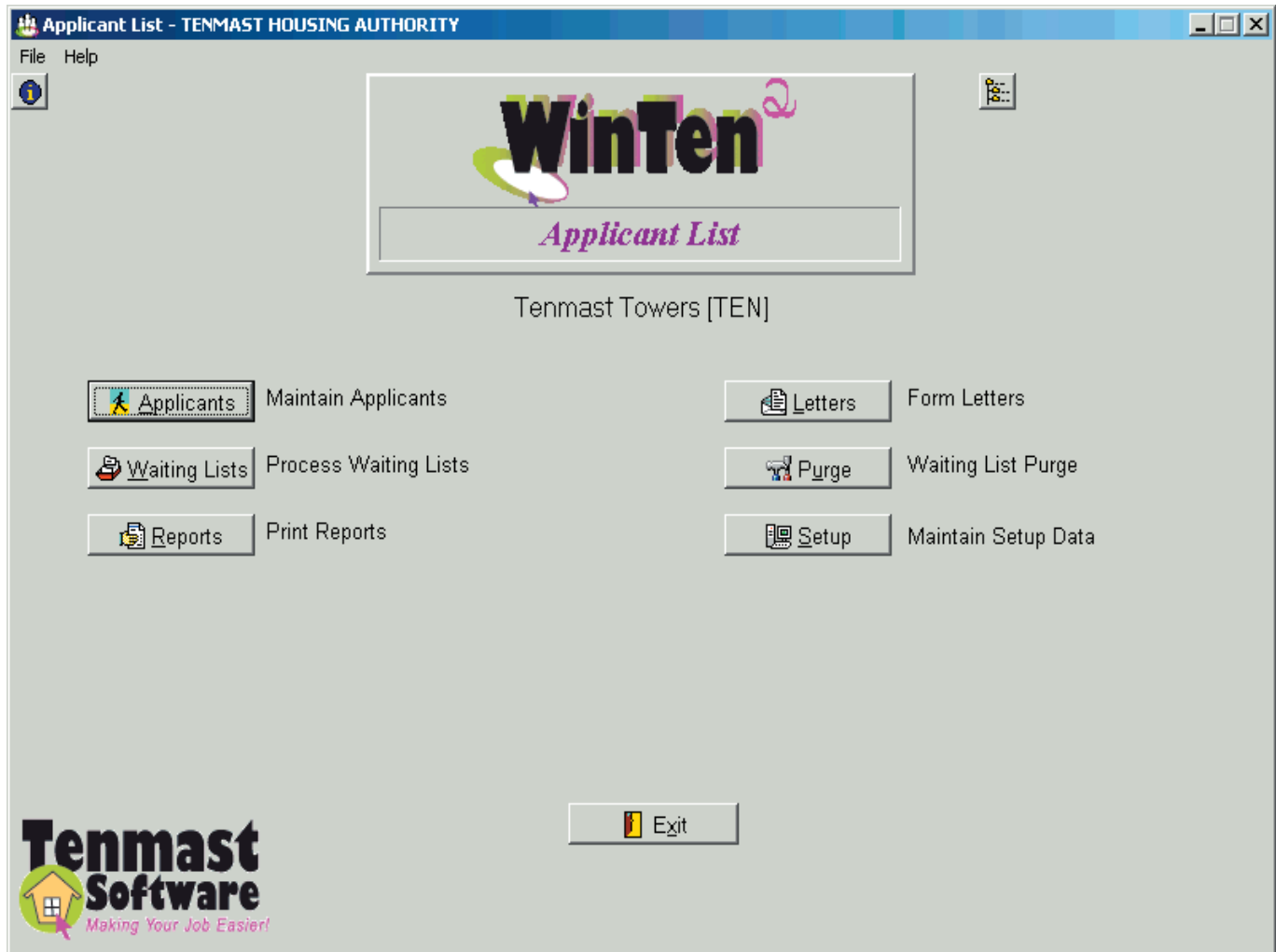
This is the management code, if any, assigned to this application.

The screenshot shows the 'Process Waiting List' window. At the top, there's a 'Waiting List' dropdown set to 'PUBLIC HOUSING, LIST A' and a 'Search For' field. Below this is a 'Waiting List Order' section with 'Number of Beds; Descending Preference Weight; Application Date/Time'. The 'Income Targeting' section shows 'On Target' and 'Applied "Singles" Rule'. A 'Show ...' section has radio buttons for 'Applicants of All Income Ranges' (selected) and 'Extremely Low Income Applicants'. A table lists applicants with columns: Rank, Pref. Wt., Application Date/Time, Inc. Level, Household Size, Singles Rule, Applicant, and Beds. The table contains three rows of data. Below the table are input fields for 'Caseworker', 'Pets', 'Home Phone', 'Work Phone', and 'Message Phone'. To the right of these are checkboxes for 'Displaced / Homeless', 'Dependents / Minors', 'Disabled or Handicapped?', and 'Requested Accessibility Features?'. At the bottom, there are fields for 'Application Num' (0000000022) and 'Management Code' (RETURNING).

| Rank | Pref. Wt. | Application Date/Time | Inc. Level | Household Size | Singles Rule | Applicant          | Beds |
|------|-----------|-----------------------|------------|----------------|--------------|--------------------|------|
| 1    | 4         | 08/02/2001 11:27:00   | E          | 1              |              | KIM, MARISSA P     | 1    |
| 2    | 4         | 08/24/2001 09:37:00   | E          | 1              |              | STEPHENS, GEORGE D | 1    |
| 3    | 2         | 09/18/2001 13:34:00   | E          | 4              |              | BABCOCK, JOHN T    | 1    |

# REPORTS

Information needs to be summarized and presented in an easy-to-understand form so the reader can make informed decisions. The Reports screen is where Applicant List turns all of its data into meaningful reports. To enter this screen, click the Reports button or press <R> at the Main Menu.



# REPORTS SCREEN

The Reports screen is divided into four tabs: List Management, Statistics, Applicant, and Setup. Each tab contains the report options for one type of reports. All four tabs are divided into two halves. The left half of a tab contains a set of radio buttons that correspond to the available reports. The right half of a tab contains the formatting options for the currently selected report. The Reports screen always opens on the List Management tab, as shown below.

The screenshot shows a software window titled "Applicant List Report". It has a menu bar with icons for file operations and a tabbed interface with four tabs: "List Management", "Statistics", "Applicant", and "Setup". The "List Management" tab is active and divided into two panes. The left pane contains a list of report options, each with a radio button. The right pane contains formatting options for the selected report.

**Applicant List Report**

List Management | Statistics | Applicant | Setup | Applicant Waiting List

☒ Applicant Waiting List  
☐ Applicant Ranking Report  
☐ Applicant Listing  
☐ Applicant Listing By Waiting List  
☐ Applicant Listing By Status  
☐ Waiting List Actions Report  
☐ Audit Tracking Report  
☐ Last Contact Date Report  
☐ Unit Offers Report  
☐ Voucher Issuance/Expiration Report  
☐ Income Targeting

Waiting List: PUBLIC HOUSING, LIST A

Waiting List Order: Number of Beds; Descending Preference Weight; Application Date/Time

Bedrooms:  ☐ Include ALL bedroom sizes on the report.  
☒ New page for each different bedroom size.

Report Type:  
☒ Summary ☐ Detail

Enter Maximum Number of Applicants to Print:

# Producing a Report

To produce a report, select its radio button. Set all of the formatting options for the report, then click the Print or Print Preview button.

If you click the Print button, a standard WinTen<sup>2</sup> print control dialog box opens. Select the printing options for the report and click OK.

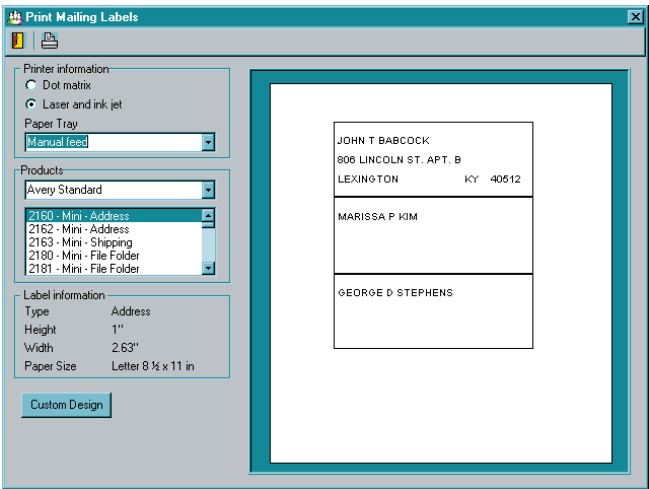
If you click the Print Preview button, a print preview screen opens with the selected report. Review the report from this screen and close it when you are finished.

# Producing Mailing Labels

The Reports screen allows you to produce mailing labels for any report which you can send to separate applicants individually. To produce mailing labels, select the report formatting options you want and click the Mailing Labels button. The Print Mailing Labels sub-screen opens.

The Print Mailing Labels sub-screen allows you to control all aspects of label printing for the set of applicants on the selected report. Specify whether your printer is dot-matrix or laser/inkjet and select the correct feed method for the blank label forms. Select the type of label forms and the specific label types you are using. As you change your label selection, the preview image on the right side of the sub-screen changes to show a preview page of the labels for the current report. The label information data fields in the bottom left area also change to show the details of the currently selected label setup.

When you are ready to produce labels, click the Print button. Click the Exit button to return to the Reports screen.



## Hint: Custom Labels

*The Applicant List program has a standard layout for mailing labels. You can also produce customized label layouts. To edit your label layout, click the Custom Design button. For information on custom label formats, see the WinTen<sup>2</sup> Report Writer documentation.*

# List Management Tab

The List Management tab contains reports on your agency's waiting lists.

## Available List Management Reports

### Applicant Waiting List

This is a listing of all applicants in a selected waiting list.

You can format this report to include all applicants or a certain number of applicants, starting from the top of the list (enter "0" for all applicants). You can also choose for the report to be a summary report (one line per applicant) or a detail report (one paragraph per applicant, with all of the data from the Process Waiting List screen). If the waiting list is for a Public Housing program, you also must select the bedroom size for which the report applies, or choose to print the report for all waiting lists.

You can print mailing labels for this report, one label for each applicant on the report. This is the report to use if you want to produce mailing labels for every applicant on a selected mailing list.

### Applicant Ranking Report

This is a publishable report on all applicants' ranks on a selected waiting list.

You can format this report to include all applicants or a certain number of applicants, starting from the top of the list (enter "0" for all applicants). You can sort this report by applicant last names or Social Security numbers. The report will not include the sort option that you do not choose; this serves to protect applicant privacy. If the waiting list is for a Public Housing program, you also must select the bedroom size for which the report applies, or choose to print the report for all waiting lists.

The Applicant Ranking Report also has the capability to update the Applicant List database when you run it. You can choose for it to update applicants' current ranking numbers, current and previous ranking numbers, or neither.

You can print mailing labels for this report, one label for each applicant on the report.

If you are producing this report for a Section 8 waiting list and you choose to include all bedroom sizes, you can also choose to group the report by bedroom size.

The screenshot shows the 'Applicant List Report' window. On the left is a sidebar with a list of report types: Applicant Waiting List (selected), Applicant Ranking Report, Applicant Listing, Applicant Listing By Waiting List, Applicant Listing By Status, Waiting List Actions Report, Audit Tracking Report, Last Updated Report, Unit Offers Report, Voucher Issuance/Expiration Report, and Income Targeting. The main area is titled 'Applicant Waiting List' and contains a 'Waiting List' dropdown menu set to 'PUBLIC HOUSING, LIST A'. Below this is a 'Waiting List Order' dropdown menu with the text 'Number of Beds; Descending Preference Weight; Application Date/Time'. There is a 'Bedrooms' input field and two checkboxes: 'Include ALL bedroom sizes on the report.' (checked) and 'New page for each different bedroom size.' (unchecked). The 'Report Type' section has two radio buttons: 'Summary' (selected) and 'Detail'. At the bottom, there is a field 'Enter Maximum Number of Applicants to Print' with the value '0'.

The screenshot shows the 'Applicant Ranking Report' window. It has a 'Waiting List' dropdown menu set to 'PUBLIC HOUSING, LIST A'. Below it is a 'Waiting List Order' dropdown menu with the text 'Number of Beds; Descending Preference Weight; Application Date/Time'. There is a 'Bedrooms' input field and three checkboxes: 'Include ALL bedroom sizes on the report.' (checked), 'New page for each different bedroom size.' (unchecked), and 'Group By Bedrooms' (unchecked). The 'Report Contents' section has two radio buttons: 'Name' (selected) and 'Social Security Number' (unchecked). Below this is a section for 'Application Number Order' with a checkbox 'Application Number Order' (unchecked). At the bottom, there is a field 'Enter Maximum Number of Applicants to Print' with the value '0'. The 'Update Ranking Numbers' section has three radio buttons: 'Do NOT Update Ranking Numbers' (selected), 'Update Current Ranking Numbers ONLY' (unchecked), and 'Update Current and Previous Ranking Numbers' (unchecked).

## Applicant Listing

This is a listing of all applicants in Applicant List's database.

You can sort this report by applicant last name or Social Security number. You can filter this report by applicant group (all applicants, all active applicants, or all inactive applicants), caseworker (applicants with any or no caseworker or applicants with a selected caseworker), management code (applicants with any or no management code or applicants with a selected management code), and/or a range of application dates.

You can also choose for the report to be a summary report (one line per applicant) or a detail report (one paragraph per applicant, with all of the data from the Process Waiting List screen).

You can print mailing labels for this report, one label for each applicant on the report. This is the report to use if you want to produce mailing labels for every applicant in Applicant List's database.

## Applicant Listing by Waiting List

This is a listing of all applicants in a selected waiting list. If the waiting list is for a Public Housing program, you also must select the bedroom size for which the report applies, or choose to print the report for all waiting lists.

You can sort the report by applicant's last name or applicant's Social Security number.

You can filter the report by caseworker and/or management code. You can also choose to print a summary report (minimal information, one line per applicant) or a detail report (expanded information, three lines per applicant).

The 'Applicant Listing' form contains the following sections:

- Include Applicants...**: Radio buttons for ☒ All, ☐ Active, and ☐ Inactive.
- Date Selection**: A 'Range of Dates' section with two date pickers.
- Report Contents**: Radio buttons for ☒ Name and ☐ Social Security Number.
- Report Type**: Radio buttons for ☒ Summary and ☐ Detail.
- Select Caseworker**: A dropdown menu.
- Select Management Code**: A dropdown menu.

The 'Applicant Listing By Waiting List' form contains the following sections:

- Waiting List**: A dropdown menu showing 'PUBLIC HOUSING, LIST A'.
- Waiting List Order**: A text box containing 'Number of Beds; Descending Preference Weight; Application Date/Time'.
- Bedrooms**: A numeric input field set to '0'.
- Include ALL bedroom sizes on the report.**: An unchecked checkbox.
- New page for each different bedroom size.**: An unchecked checkbox.
- Date Selection**: A 'Range of Dates' section with two date pickers.
- Report Contents**: Radio buttons for ☒ Name and ☐ Social Security Number.
- Report Type**: Radio buttons for ☒ Summary and ☐ Detail.
- Select Caseworker**: A dropdown menu.
- Select Management Code**: A dropdown menu.

### Applicant Listing By Status

This is a listing of all applicants in a selected waiting list who have a selected status. If the waiting list is for a Public Housing program, you also must select the bedroom size for which the report applies, or choose to print the report for all waiting lists.

You can sort this report by applicant last name, Social Security number, or ranking order on the selected waiting list. You can filter the report to include all applicants on the waiting list or only applicants with a selected status, and/or by a range of application dates.

You can print mailing labels for this report, one label for each applicant on the report.

### Waiting List Actions Report

This report lists all occurrences of a selected applicant editing action within a selected range of dates. If the report is for a public housing waiting list, you must specify requested bedroom size as well as waiting list, or choose to print the report for all waiting lists.

You can sort this report by action date or applicant last name. You can limit it to a maximum number of action occurrences, or enter "0" to include all occurrences within the selected date range. You can filter the report to include all actions or one selected action.

You can print mailing labels for this report, one label for each applicant on the report.

### Audit Tracking Report

This report lists all auditable activity within a selected date range.

This report is always sorted by chronological order of the auditable activities. You can filter it to include all waiting lists or one selected waiting list. If you choose one specific public housing waiting list, you must specify requested bedroom size as well as waiting list. You can also filter the report for activities performed by one selected user (by initials) or by all users.

### Last Contact Report

This report lists all applicants whose records were last updated within a selected range of dates.

You can filter the report to include all waiting lists or one selected waiting list. If you choose one specific public housing waiting list, you must specify requested bedroom size as well as waiting list, or choose to print the report for all waiting lists.

You can print mailing labels for this report, one label for each applicant on the report.

The 'Applicant Listing By Status' form includes the following fields: 'Waiting List' (dropdown menu showing 'PUBLIC HOUSING, LIST A'), 'Waiting List Order' (text box with 'Number of Beds; Descending Preference Weight; Application Date/Time'), 'Bedrooms' (text box with '0'), 'Report Order' (radio buttons for 'Name' (selected), 'Social Security Number', and 'Ranking Order'), 'Status Selection' (text box with 'Select Status or Leave Blank for ALL'), and 'Date Selection' (text box with 'Range of Dates' and two date pickers).

The 'Waiting List Actions Report' form includes the following fields: 'Waiting List' (dropdown menu showing 'PUBLIC HOUSING, LIST A'), 'Waiting List Order' (text box with 'Number of Beds; Descending Preference Weight; Application Date/Time'), 'Bedrooms' (text box), 'Include ALL bedroom sizes on the report' (checkbox, checked), 'New page for each different bedroom size' (checkbox, unchecked), 'Date Selection' (text box with 'Range of Dates' and two date pickers showing '1/01/2002' and '3/31/2002'), 'Select an Action or Leave Blank for ALL' (text box), and 'Report Type' (radio buttons for 'Last Name' (selected) and 'Date of Action').

The 'Audit Tracking Report' form includes the following fields: 'Waiting List' (dropdown menu), 'Waiting List Order' (text box), 'Date Selection' (text box with 'Range of Dates' and two date pickers), and 'Enter Initials or Leave Blank for ALL' (text box).

The 'Last Contact Date Report' form includes the following fields: 'Waiting List' (dropdown menu showing 'PUBLIC HOUSING, LIST A'), 'Waiting List Order' (text box with 'Number of Beds; Descending Preference Weight; Application Date/Time'), 'Bedrooms' (text box), 'Include ALL bedroom sizes on the report' (checkbox, unchecked), 'New page for each different bedroom size' (checkbox, checked), 'Date Selection' (text box with 'Range of Dates' and two date pickers showing '04/23/2001' and '04/22/2003').

## Unit Offers Report

This report lists all unit offers made for a selected waiting list. If the report is for a public housing waiting list, you must specify requested bedroom size as well as waiting list, or choose to print the report for all waiting lists.

You can filter the report by a range of offer dates or a range of offer response dates, or leave these fields blank for all offers regardless of date. You can also filter the report by unit status, or include all unit statuses. The report can include either applicant name or applicant Social Security number.

The screenshot shows the 'Unit Offers Report' form. It includes a 'Waiting List' dropdown menu set to 'PUBLIC HOUSING, LIST A'. The 'Waiting List Order' is set to 'Number of Beds; Descending Preference Weight; Application Date/Time'. There are checkboxes for 'Bedrooms' (set to 0), 'Include ALL bedroom sizes on the report', and 'New page for each different bedroom size'. The 'Which Date Selection' section has radio buttons for 'Offer Date' (selected) and 'Response Date'. The 'Date Selection' section has a 'Range of Dates' with two date pickers. The 'Status Selection' section has a dropdown menu. The 'Report Contents' section has radio buttons for 'Name' (selected) and 'Social Security Number'.

## Voucher Issuance/Expiration Report

This report lists all vouchers issued or expired in a selected waiting list.

You can filter the report by a range of voucher issuance dates or a range of voucher expiration dates, or leave these fields blank for all vouchers regardless of dates. You can also filter the report by voucher status, or include all voucher statuses. The report can include either applicant name or applicant Social Security number.

The screenshot shows the 'Voucher Issuance/Expiration Report' form. It includes a 'Waiting List' dropdown menu set to 'PUBLIC HOUSING, LIST A'. The 'Waiting List Order' is set to 'Number of Beds; Descending Preference Weight; Application Date/Time'. There are checkboxes for 'Bedrooms' (set to 0), 'Include ALL bedroom sizes on the report', and 'New page for each different bedroom size'. The 'Which Date Selection' section has radio buttons for 'Offer Date' (selected) and 'Expired Date'. The 'Date Selection' section has a 'Range of Dates' with two date pickers. The 'Status Selection' section has a 'Voucher Status' dropdown menu. The 'Report Contents' section has radio buttons for 'Name' (selected) and 'Social Security Number'.

## Income Targeting

This report presents your agency's income targeting compliance for a selected housing program type.

You can produce a summary report or a detailed report. The report can cover all dates or a selected range of dates, and you can sort it by name, SSN, or date housed.

The screenshot shows the 'Income Targeting' form. It includes a 'Housing Program Type' dropdown menu set to 'Multi-Family Housing (TRACS)'. The 'Report Type' section has radio buttons for 'Detail' (selected) and 'Summary'. The 'Date Selection' section has a 'Range of Dates' with two date pickers. The 'Report Order' section has radio buttons for 'Name' (selected), 'Social Security Number', and 'Date Housed'.

# Statistics Tab

The Statistics tab contains reports that provide statistical analysis of the individuals on your agency's waiting lists.

## Available Statistics Reports

### Minors Report

This report shows all minors in each household (within a selected range of dates of birth, or with birthdays in a selected month) and who their heads of household are.

You can sort this report by last name, age, or date of birth. You can format the report as a standard report (name, Social Security number, birth date, and age), a quick report (name and age), or a complete report (name, address, Social Security number, birth date, and age).

You can print mailing labels for this report, one label for each head of household who has a household member on the report.

The screenshot shows the 'Applicant List Report' window with the 'Statistics' tab selected. The 'Minors Report' section is active, displaying a list of report options on the left and configuration settings on the right.

**Left Panel (Report Options):**

- ☒ Minors Report
- ☐ Age Listing - All Household Members
- ☐ Age Listing - Applicants Only
- ☐ Impairment Listing
- ☐ Racial Report
- ☐ Income Levels

**Right Panel (Configuration):**

- Waiting List:** [ None ]
- Waiting List Order:** [ ]
- What Order?:**
  - ☒ Name
  - ☐ Age
  - ☐ Birth date
- Type of Report:**
  - ☒ Standard - Name, SSN, Birthdate, Age
  - ☐ Quick - Name, Age
  - ☐ Complete - Name, Address, SSN, Birthdate, Age
- What birthdays do you want?:**
  - ☒ All Dates
    - Please enter date range: 04/23/1900 to 04/22/2003
  - ☐ Specific Birth Month

### Age Listing - All Household Members

This report shows all individuals in each household within a selected range of dates of birth, or with birthdays in a selected month, and who their heads of household are.

You can sort this report by last name, age, or date of birth. You can format the report as a standard report (name, Social Security number, birth date, and age), a quick report (name and age), or a complete report (name, address, Social Security number, birth date, and age).

You can print mailing labels for this report, one label for each head of household who has a household member on the report.

The screenshot shows a web-based form titled 'Age Listing'. It contains three main sections: 'What Order?', 'Type of Report', and 'What birthdays do you want?'. In the 'What Order?' section, 'Name' is selected. In the 'Type of Report' section, 'Standard - Name, SSN, Birthdate, Age' is selected. In the 'What birthdays do you want?' section, 'All Dates' is selected, and there are input fields for 'Please enter the starting date:' and 'Please enter the ending date:'. Below this, 'Specific Birth Month' is also an option, with a sub-section 'Which Month:' containing radio buttons for each month from January to December. January is currently selected.

### Age Listing - Applicants Only

This report shows all applicants within a selected range of dates of birth, or with birthdays in a selected month, and who their heads of household are.

You can sort this report by last name, age, or date of birth. You can format the report as a standard report (name, Social Security number, birth date, and age), a quick report (name and age), or a complete report (name, address, Social Security number, birth date, and age).

You can print mailing labels for this report, one label for each head of household who has a household member on the report.

### Impairment Listing

This report provides statistical analysis of handicapped and disabled individuals on all waiting lists or one selected waiting list.

You can filter this report to include all applicant household members, all heads of households, or all non-head household members. You can also filter the report to include individuals with all impairments or only individuals with one or more impairments within a selected set.

You can print mailing labels for this report, one label for each household with members on the report.

The screenshot shows the 'Impairment Listing' report configuration window. It includes a 'Waiting List' dropdown set to 'PUBLIC HOUSING, LIST A', a 'Waiting List Order' dropdown set to 'Number of Beds; Descending Preference Weight; Application Date/Time', and a 'Bedrooms' input field set to '0'. Under 'What to List', the 'All Applicants' radio button is selected. Under 'Which Impairments', the 'ALL' checkbox is checked, and there are checkboxes for 'Vision', 'Hearing', 'Wheel Chair', 'Mentally', 'Physically', 'User Defined 1', 'User Defined 2', 'User Defined 3', 'User Defined 4', and 'User Defined 5'.

### Racial Report

This report shows statistics on the racial and ethnic breakdown of applicants on a selected waiting list, distributed by bedroom size, tenant code, and handicapped status.

You can filter the report to include all applicants on the waiting list or only applicants who have undergone a selected action, and/or by a range of application dates.

The screenshot shows the 'Racial Report' report configuration window. It includes a 'Waiting List' dropdown set to 'PUBLIC HOUSING, LIST A', a 'Waiting List Order' dropdown set to 'Number of Beds; Descending Preference Weight; Application Date/Time', and a 'Bedrooms' input field set to '0'. There is a 'Date Selection' section with 'Range of Dates' input fields. Below that is an 'Action Selection' section with a dropdown menu set to 'Select Action or Leave Blank for ALL'.

### Income Levels

This report shows statistics on the income levels (low, very low, extremely low) of the applicants on a selected waiting list.

You can filter the report to include all applicants on the waiting list or only applicants with a certain bedroom size and/or application date range.

The screenshot shows the 'Income Levels' report configuration window. It includes a 'Waiting List' dropdown set to 'PUBLIC HOUSING, LIST A', a 'Waiting List Order' dropdown set to 'Number of Beds; Descending Preference Weight; Application Date/Time', and a 'Bedrooms' input field. There is a checkbox for 'Include ALL bedroom sizes on the report.' and a checkbox for 'New page for each different bedroom size.' Below that is a 'Report Type' section with 'Detail' and 'Summary' radio buttons. At the bottom is a 'Date Selection' section with 'Range of Dates' input fields.

# Applicant Tab

The Applicant tab contains the reports that are available on the various tabs of the Maintain Applicants screen.

## Available Applicant Reports

### Blank Application

This is a blank application form for an applicant to fill out. It has no formatting options.

### Lists Applied For

This shows the waiting lists for which all applicants, or one selected applicant, have applied.

You can filter this report to include only applications entered within a selected range of dates, or leave the date fields blank for all outstanding applications.

The screenshot shows a software window titled "Applicant List Report" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a toolbar with three icons: a folder, a printer, and a document. A tabbed interface is present with four tabs: "List Management", "Statistics", "Applicant", and "Lists Applied For". The "Applicant" tab is currently selected. On the left side of the window, under the "Applicant" tab, there is a list of five radio button options: "Blank Application", "Lists Applied For" (which is selected), "Activity Log", "Change Tracking Log", and "Vouchers / Unit Offers". On the right side, under the "Lists Applied For" tab, there are two sections. The "Date Selection" section contains a "Range of Dates" label followed by two date input fields, each with a dropdown arrow. The "Applicant Selection" section contains two radio button options: "All Applicants" and "Single Applicant" (which is selected). Below these options is a yellow rectangular input field with a search icon (magnifying glass) on the right.

### Activity Log

This summarizes all editing actions performed on all applicants or one selected applicant.

You can filter this report to include only editing actions performed within a selected range of dates, or leave the date fields blank for all editing applications.

You can print mailing labels for this report, one label for each applicant on the report.

### Change Tracking Log

This shows all auditable actions performed on all applicants or one selected applicant.

You can filter this report to include only changed made within a selected range of dates, or leave the date fields blank for all changes.

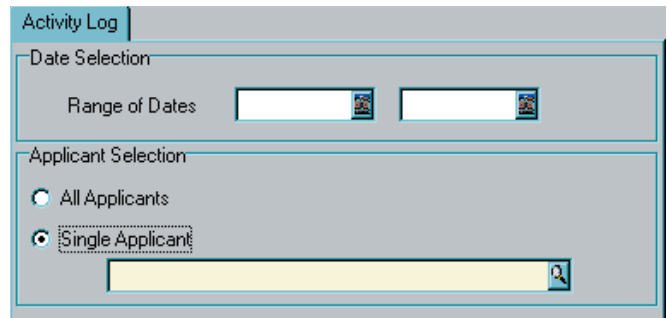
You can print mailing labels for this report, one label for each applicant on the report.

### Vouchers/Unit Offers

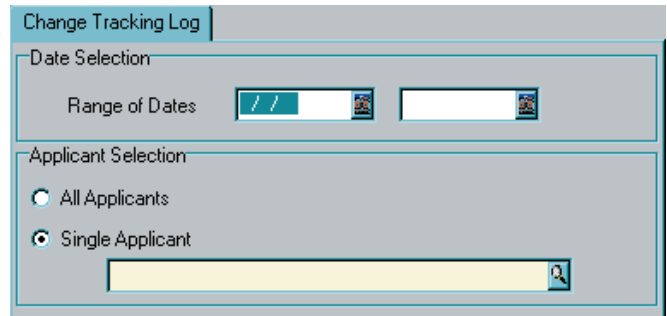
This shows the outstanding and previous vouchers and unit offers for all applicants or one selected applicant.

You can filter this report to include only vouchers and offers issued within a selected range of dates, or leave the date fields blank for all vouchers and offers.

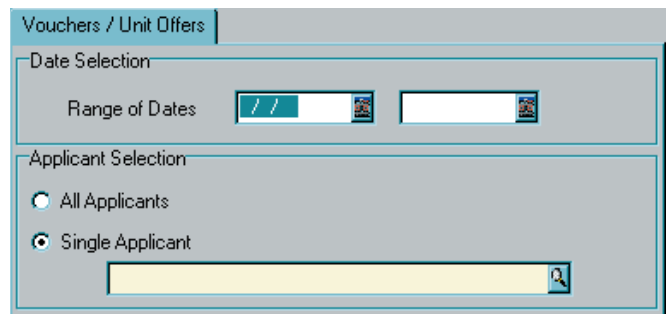
You can print mailing labels for this report, one label for each applicant on the report.



The 'Activity Log' form has a title bar with the text 'Activity Log'. Below it is a 'Date Selection' section with a 'Range of Dates' label and two empty date input fields. Underneath is an 'Applicant Selection' section with two radio buttons: 'All Applicants' and 'Single Applicant'. The 'Single Applicant' option is selected. Below the radio buttons is a yellow search bar with a magnifying glass icon on the right.



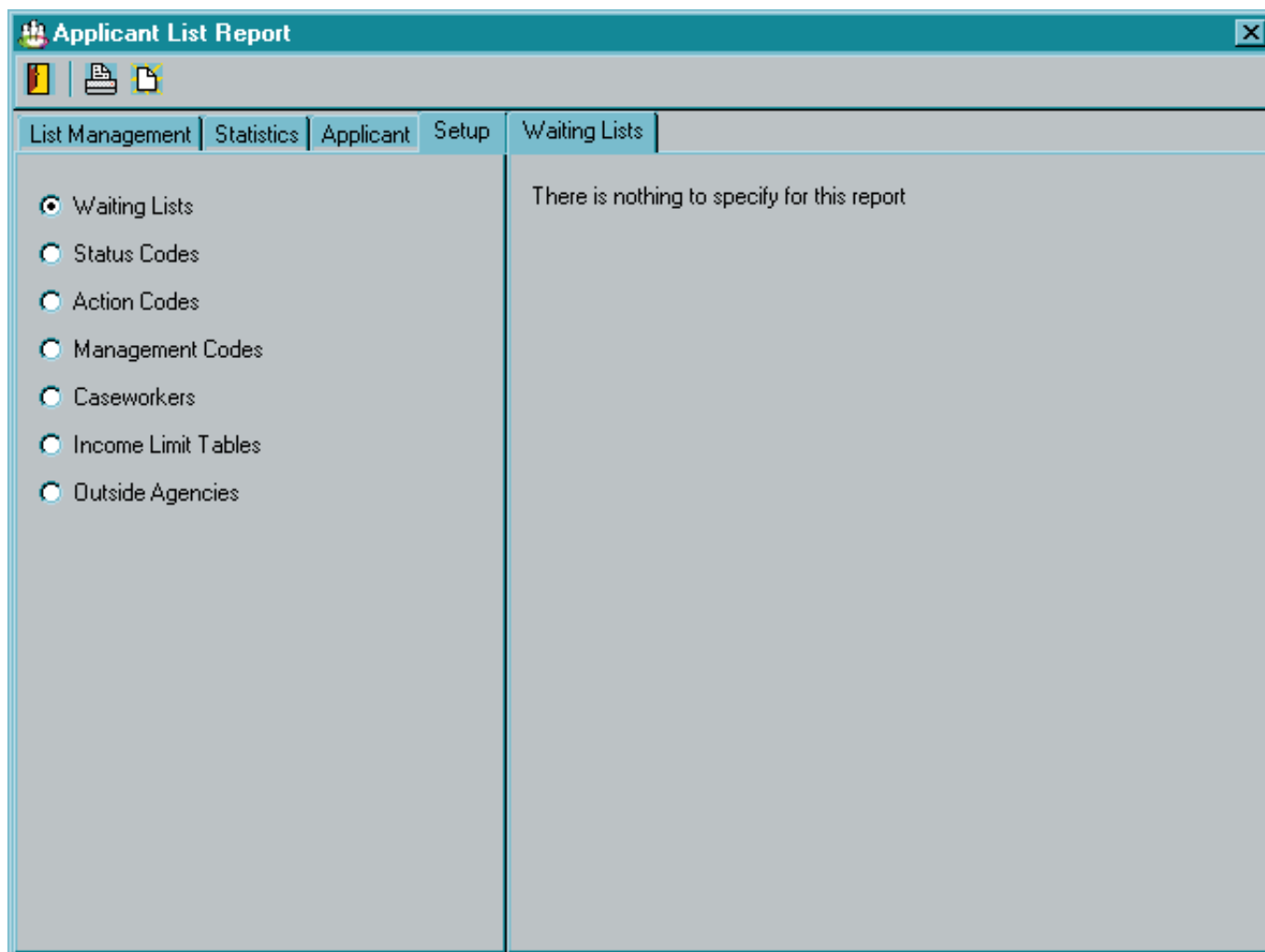
The 'Change Tracking Log' form has a title bar with the text 'Change Tracking Log'. Below it is a 'Date Selection' section with a 'Range of Dates' label and two date input fields. The first date field contains the text '//'. Underneath is an 'Applicant Selection' section with two radio buttons: 'All Applicants' and 'Single Applicant'. The 'Single Applicant' option is selected. Below the radio buttons is a yellow search bar with a magnifying glass icon on the right.



The 'Vouchers / Unit Offers' form has a title bar with the text 'Vouchers / Unit Offers'. Below it is a 'Date Selection' section with a 'Range of Dates' label and two date input fields. The first date field contains the text '//'. Underneath is an 'Applicant Selection' section with two radio buttons: 'All Applicants' and 'Single Applicant'. The 'Single Applicant' option is selected. Below the radio buttons is a yellow search bar with a magnifying glass icon on the right.

# Setup Tab

The Setup tab contains reports on Applicant List's setup features. None of these reports have formatting options; they are simply listings of setup information.



## **Available Setup Reports**

### **Waiting Lists**

This report lists the waiting lists that are set up in the program.

### **Status Codes**

This report lists the applicant status codes that are set up in the program.

### **Action Codes**

This report lists the applicant record action codes that are set up in the program.

### **Management Codes**

This report lists the applicant filtering (management) codes that are set up in the program.

### **Caseworkers**

This report lists the caseworkers who are set up in the program.

### **Income Limit Tables**

This report lists and details the income limit tables that are set up in the program.

### **Outside Agencies**

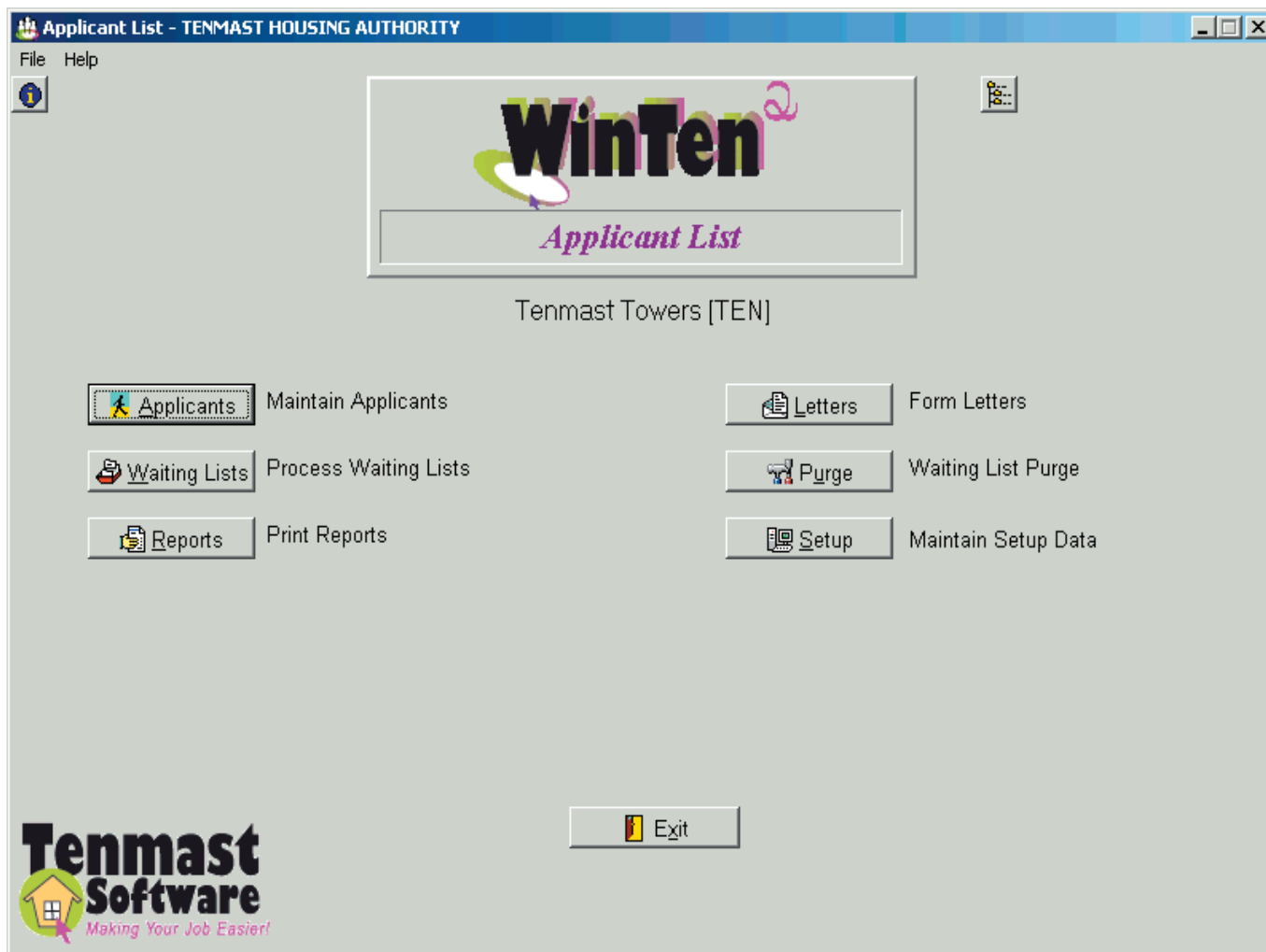
This report lists the outside agencies that are set up in the program.

# FORM LETTERS

Applicant List features the WinTen<sup>2</sup> Form Letter module. This module is present in several WinTen<sup>2</sup> programs. It allows you to take data from a program and generate a batch of form letters based on that data.

To enter the Form Letter module, click the Letters button or press <L> at the Main Menu.

For detailed documentation on the Form Letter module, please refer to the Form Letters in WinTen<sup>2</sup> manual.





# PURGE WAITING LISTS

Purging a waiting list is a data management process that removes incorrect or out-of-date applicant data from that list. This ensures that all of the remaining data is correct and complete, which, in turn, makes your agency's management of those applicants more efficient. The purge function in Applicant List also maintains data on purged applicants to satisfy HUD audit requirements.

Like many data management processes in the WinTen<sup>2</sup> programs, waiting list purging has a set of HUD recommendations associated with it. HUD strongly suggests that your purging procedures be laid out in your agency's administrative plan. Your administrative plan should cover the following points:

- how often to purge each waiting list (typically annually)
- the conditions an applicant must meet, or fail to meet, before being removed from the list
- how many notices must be sent to each applicant prior to purging
- how long each applicant should have to reply before being marked for purge

The purge function in Applicant List functions in two steps: creating a list of applicants to purge and actually purging them. To start this process, click the Purge button or press <U> at the Main Menu.

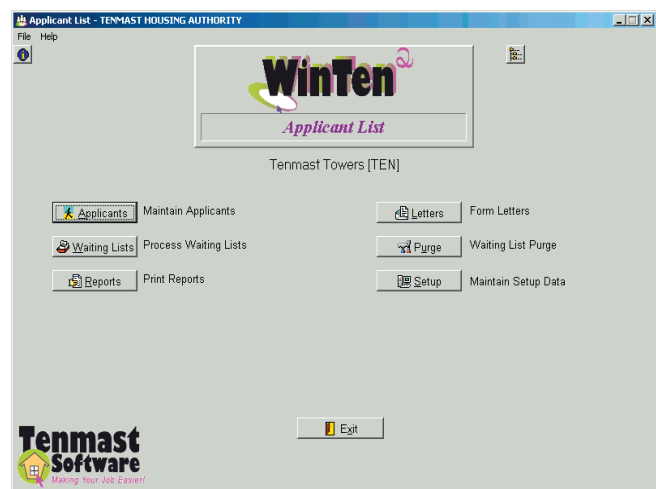
## Hint: What HUD Says

*For a detailed treatment of HUD's recommendations on purging your waiting lists, refer to the Housing Choice Voucher Program Guidebook (7420G), Chapter 4.*

## Hint: Sample Purge Policy (The Short Form)

*(From the Housing Choice Voucher Program Guidebook)*

- Send a notice by first class mail.
- For each notice marked "Addressee Unknown," close the application, attach the returned notice and envelope, and file and maintain for three years.
- For each application for which there has been no response and no returned notice, send a second notice by certified mail providing a final deadline. When the final deadline passes, close applications for which there has been no response and maintain the record of the certified delivery with the original application for a period of three years.



## Hint: Unit Offers and Vouchers

*You cannot purge applicants with open unit offers or issued vouchers.*

# WAITING LIST PURGE SCREEN

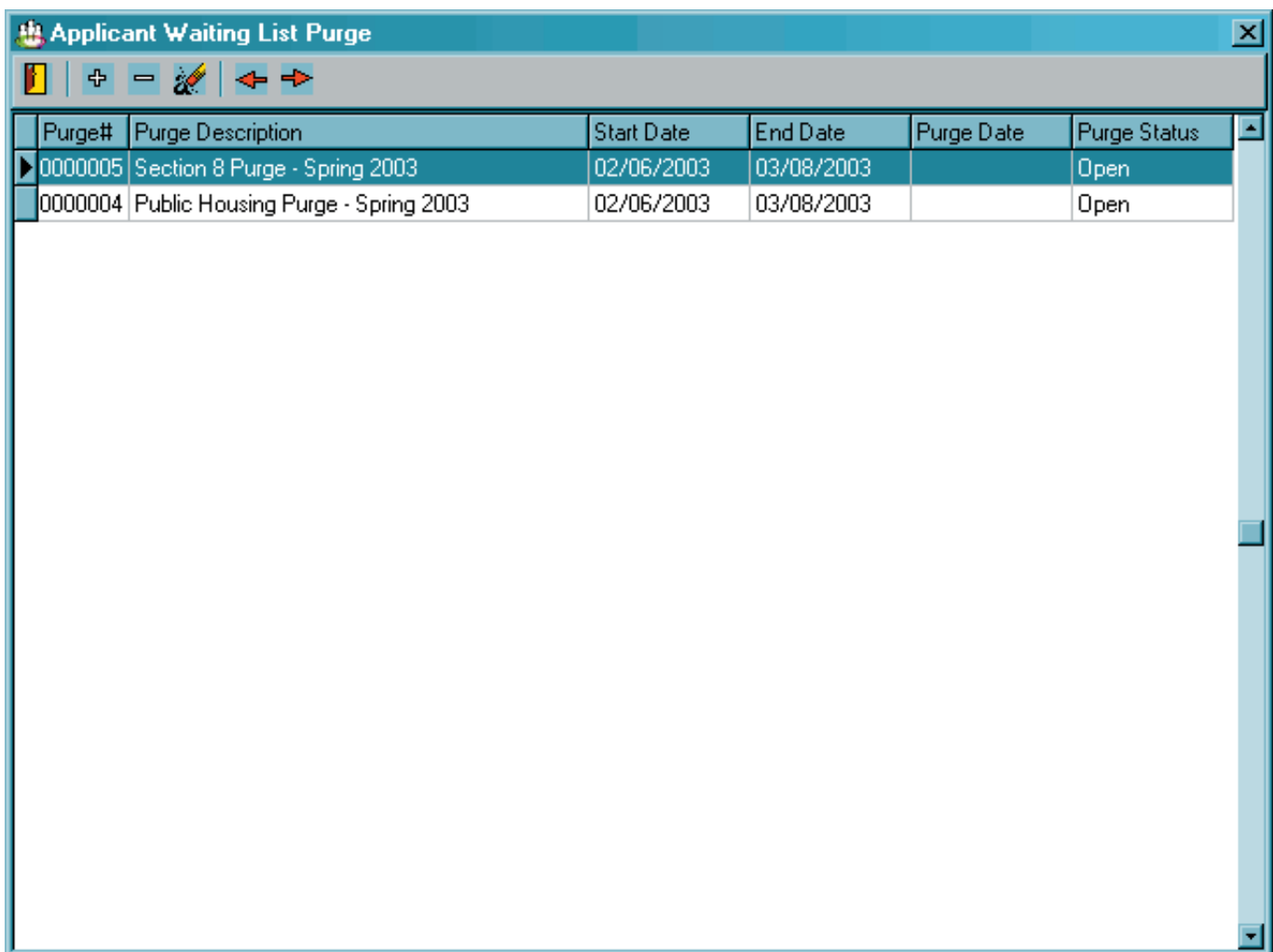
When you start the purge process, the Waiting List Purge screen opens. This screen contains a table of every purge list you have created in the program. The table sorts these lists in order of creation, most recent first. It also lists the date on which each purge was created, the date on which applicant responses were due for that purge, and the day on which the purge was enacted (if applicable).

To create a new purge list, click the Add button. This starts the Applicant Purge wizard, described in the Applicant List Tasks chapter of this manual.

To delete a purge list, click the Delete button.

**NOTE: For audit purposes, you cannot delete or edit a purge list once the purge has been run.**

To edit an existing purge list, select it in the table and click the Edit button. This opens the Maintain Purge List screen.



| Purge#  | Purge Description                  | Start Date | End Date   | Purge Date | Purge Status |
|---------|------------------------------------|------------|------------|------------|--------------|
| 0000005 | Section 8 Purge - Spring 2003      | 02/06/2003 | 03/08/2003 |            | Open         |
| 0000004 | Public Housing Purge - Spring 2003 | 02/06/2003 | 03/08/2003 |            | Open         |

# MAINTAIN PURGE LIST SCREEN

The Maintain Purge List screen contains the detailed information for a single purge list. This information includes the name, Social Security number, waiting list, and requested bedroom size of every applicant on the purge list. It also shows whether or not each applicant is marked to be purged and/or already has been purged.

| Maintain Purge List : Public Housing Purge - Spring 2003 |             |                      |                        |            |         |  |
|----------------------------------------------------------|-------------|----------------------|------------------------|------------|---------|--|
| <div> </div>                                             |             |                      |                        |            |         |  |
| View                                                     | All         | Order by             | Last Name, First Name  | Search For | Go      |  |
| Purge?                                                   | HSSAN#      | Applicant            | Waiting List           | Bed Rooms  | Purged? |  |
| No                                                       | 492-19-4294 | BABCOCK, JOHN T      | PUBLIC HOUSING, LIST A | 1          | No      |  |
| No                                                       | 341-55-8641 | BATES, CYNTHIA A     | PUBLIC HOUSING, LIST A | 3          | No      |  |
| No                                                       | 114-92-7856 | BLETHEN, NOLAN H     | PUBLIC HOUSING, LIST A | 3          | No      |  |
| No                                                       | 114-92-7856 | BLETHEN, NOLAN H     | PUBLIC HOUSING, LIST A | 4          | No      |  |
| Yes                                                      | 654-64-5113 | BROULLIARD, DARREN A | PUBLIC HOUSING, LIST A | 4          | No      |  |
| Yes                                                      | 654-64-5113 | BROULLIARD, DARREN A | PUBLIC HOUSING, LIST A | 5          | No      |  |
| No                                                       | 517-44-8156 | CHIVADORI, ENRICO M  | PUBLIC HOUSING, LIST A | 2          | No      |  |
| No                                                       | 364-45-1551 | GOLD, JULIA L        | PUBLIC HOUSING, LIST A | 2          | No      |  |
| No                                                       | 451-34-8661 | GRABOWSKI, DONALD P  | PUBLIC HOUSING, LIST A | 3          | No      |  |
| No                                                       | 999-99-0827 | HASHIMOTO, GREGORY T | PUBLIC HOUSING, LIST A | 1          | No      |  |
| No                                                       | 741-35-3107 | KIM, MARISSA P       | PUBLIC HOUSING, LIST A | 1          | No      |  |
| Yes                                                      | 661-15-4711 | MICHAELS, DANNY L    | PUBLIC HOUSING, LIST A | 4          | No      |  |
| Yes                                                      | 661-15-4711 | MICHAELS, DANNY L    | PUBLIC HOUSING, LIST A | 5          | No      |  |
| No                                                       | 531-88-3437 | RENARD, FRANCIS V    | PUBLIC HOUSING, LIST A | 1          | No      |  |
| Yes                                                      | 315-64-8671 | SOMMERS, ALLISON T   | PUBLIC HOUSING, LIST A | 1          | No      |  |
| No                                                       | 333-44-5555 | STEPHENS, GEORGE D   | PUBLIC HOUSING, LIST A | 1          | No      |  |
| No                                                       | 646-55-7414 | TROSTLE, CHRISTIAN G | PUBLIC HOUSING, LIST A | 0          | No      |  |
| No                                                       | 646-55-7414 | TROSTLE, CHRISTIAN G | PUBLIC HOUSING, LIST A | 1          | No      |  |
| No                                                       | 652-35-4781 | WOODS, ANDREA J      | PUBLIC HOUSING, LIST A | 0          | No      |  |
| No                                                       | 652-35-4781 | WOODS, ANDREA J      | PUBLIC HOUSING, LIST A | 1          | No      |  |

## Maintain Purge List Screen Controls

### Generate Notification Letter Button

The Generate Notification Letter button starts the Generate Form Letter wizard. This seven-step wizard controls the process for creating a single form letter, and is described in detail in the Form Letters in WinTen<sup>2</sup> manual. Use the wizard to select the correct form letter template to use (in this case, the letter that your agency sends to applicants to request that they verify their current information if they want to remain on the waiting list).



### Print and Print Preview Buttons

On the Maintain Purge List screen, the Print and Print Preview buttons produce the Applicant Waiting List Purge Report. This report copies the data that is currently displayed on the screen (see View and Order By, below, for information on how to change the data that the screen displays).



### Show Printed Documents Button

The Show Printed Documents button opens the Printed Documents sub-screen for the currently selected applicant. This sub-screen, described at the end of this chapter, enables you to audit the form letters that have been printed for this applicant.



### View

The View drop-down selection box enables you to filter the applicants currently shown on the screen: all, only those who are marked to be purged, or only those who are not marked to be purged.

### Order By

The Order By drop-down selection box enables you to sort the applicants shown on the screen by name or Social Security number.

### Search For ... Go

This data field enables you to search for a specific applicant on the purge list. Enter the target of your search in this data field and click the Go button. The program searches whichever column you have selected with the Order By control and highlights the first record in the table that matches your search target.

The screenshot shows the 'Maintain Purge List : Public Housing Purge - Spring 2003' window. It features a table with columns: Purge?, HSSAN#, Applicant, Waiting List, Bed Rooms, and Purged?. The table lists 20 applicants. The 'View' dropdown is set to 'All', 'Order by' is 'Last Name, First Name', and 'Search For' is empty. The 'Go' button is visible.

| Purge? | HSSAN#      | Applicant            | Waiting List           | Bed Rooms | Purged? |
|--------|-------------|----------------------|------------------------|-----------|---------|
| No     | 492-19-4294 | BABCOCK, JOHN T      | PUBLIC HOUSING, LIST A | 1         | No      |
| No     | 341-55-9641 | BATES, CYNTHIA A     | PUBLIC HOUSING, LIST A | 3         | No      |
| No     | 114-92-7856 | BLETHEN, NOLAN H     | PUBLIC HOUSING, LIST A | 3         | No      |
| No     | 114-92-7856 | BLETHEN, NOLAN H     | PUBLIC HOUSING, LIST A | 4         | No      |
| Yes    | 654-64-5113 | BROULLIARD, DARREN A | PUBLIC HOUSING, LIST A | 4         | No      |
| Yes    | 654-64-5113 | BROULLIARD, DARREN A | PUBLIC HOUSING, LIST A | 5         | No      |
| No     | 517-44-8156 | CHIVADORI, ENRICO M  | PUBLIC HOUSING, LIST A | 2         | No      |
| No     | 364-45-1551 | GOLD, JULIA L        | PUBLIC HOUSING, LIST A | 2         | No      |
| No     | 451-34-9661 | GRABOWSKI, DONALD P  | PUBLIC HOUSING, LIST A | 3         | No      |
| No     | 999-99-0827 | HASHIMOTO, GREGORY T | PUBLIC HOUSING, LIST A | 1         | No      |
| No     | 741-35-3107 | KIM, MARISSA P       | PUBLIC HOUSING, LIST A | 1         | No      |
| Yes    | 661-15-4711 | MICHAELS, DANNY L    | PUBLIC HOUSING, LIST A | 4         | No      |
| Yes    | 661-15-4711 | MICHAELS, DANNY L    | PUBLIC HOUSING, LIST A | 5         | No      |
| No     | 531-88-3437 | RENARD, FRANCIS V    | PUBLIC HOUSING, LIST A | 1         | No      |
| Yes    | 315-64-8671 | SOMMERS, ALLISON T   | PUBLIC HOUSING, LIST A | 1         | No      |
| No     | 333-44-5555 | STEPHENS, GEORGE D   | PUBLIC HOUSING, LIST A | 1         | No      |
| No     | 646-55-7414 | TROSTLE, CHRISTIAN G | PUBLIC HOUSING, LIST A | 0         | No      |
| No     | 646-55-7414 | TROSTLE, CHRISTIAN G | PUBLIC HOUSING, LIST A | 1         | No      |
| No     | 652-35-4781 | WOODS, ANDREA J      | PUBLIC HOUSING, LIST A | 0         | No      |
| No     | 652-35-4781 | WOODS, ANDREA J      | PUBLIC HOUSING, LIST A | 1         | No      |

## Maintain Purge List Screen Other Functions

### Change Purge Status

This option changes the “Purge?” status of the selected applicant.

### Mark All to be Purged

This option changes the “Purge?” status of all applicants on the current purge list to “Yes” (“To Be Purged”).

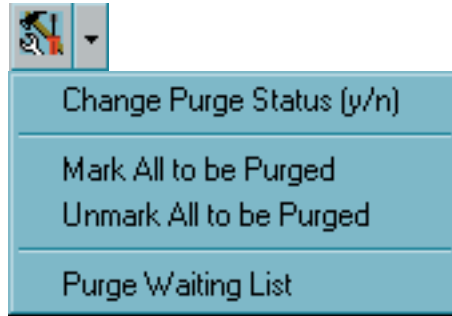
### Unmark All to be Purged

This option changes the “Purge?” status of all applicants on the current purge list to “No” (“Not To Be Purged”).

### Purge Waiting List

This option initiates the purge process for this purge list.

When you select the Purge Waiting List option, a pair of confirmation dialog boxes open, one after the other. If you click Yes in both, the program purges every applicant on the purge list whose “Purge?” status is “Yes.”



# Printed Documents Sub-Screen

This sub-screen contains a table of every form letter that has been printed for the selected applicant, and data fields containing the detailed information on the selected document. It also allows you to record the details of responses to these letters for audit and purge tracking purposes. Use the standard WinTen<sup>2</sup> controls to edit the data on this tab and save or cancel your changes.

**NOTE: If you change the Response data fields of any document on this sub-screen, the applicant's "Purge?" status is set to "No."**

Printed Documents

File Edit Actions View



| Document Description   | Print Date | Due Date   | Received   | Additional Description        |
|------------------------|------------|------------|------------|-------------------------------|
| ▶ Applist Purge Letter | 02/06/2003 | 02/21/2003 | 02/09/2003 | SOMMERS, ALLISON T / 315-64-8 |

Document Description

Applist Purge Letter

Date / Time Created

02/06/2003

11:05

Created By

BR

Date / Time Printed

02/06/2003

11:05

Printed By

CAO

Additional Description

SOMMERS, ALLISON T / 315-64-8671

Response

Due Date

02/21/2003

Date / Time

02/09/2003

16:00

Received From

Sommers, Allison T

Method

In Person

Received By

Dan

## Printed Documents Sub-Screen Data Fields

### *Document Details*

You cannot edit the document detail data fields. These are set when the document is printed.

#### **Document Description**

This is the title of the selected document.

#### **Date/Time Created**

These are the initials of the user who created the document.

#### **Created By**

These are the initials of the user who created the document.

#### **Date/Time Printed**

These are the initials of the user who printed the document.

#### **Printed By**

These are the initials of the user who printed the document.

#### **Additional Description**

This is additional data that the program saves to identify the document.

### *Response*

#### **Due Date**

This is the date by which a response to the document is due.

#### **Date/Time**

These are the date and time at which your agency received a response to the document.

#### **Received From**

This is the name of the individual or organization from whom the response came.

#### **Method**

This drop-down selection box allows you to specify the method by which the respondent responded.

#### **Received By**

This is the name of the user who received the response.



# APPLICANT LIST TASK WIZARDS

The Applicant List program allows you to handle applicant data in many ways. This chapter describes the common tasks that you will need to perform in managing Applicant List data.

## Adding a New Applicant

To add a new applicant, go to the Main Menu.

Click the Applicants button or press <A>. The Browse Applicants screen opens.

On the Browse Applicants screen, click the Add button. The Add Applicant wizard opens.

## Add Applicant Wizard

### Step One

In Step One, enter the applicant's Social Security number and name. The application date and time default to the current system date and time. If these differ from the default values, change them to be correct.

Click the Start button to proceed to Step Two.

**Add Applicant (Step 1 of 10)**

Enter Applicant Information

Social Security # 621-53-1543

First Name CYNTHIA

Middle Initial A

Last Name BATES

Application Date 01/02/2002

Application Time 11:13:04

Instructions

Enter applicant's social security number, name, and when they submitted an application

Start >> Cancel

## Step Two

Verify that you correctly entered the applicant's name and Social Security number.

Click the Next button to proceed to Step Three, or the Back button to return to Step One and make corrections.

When you click the Next button, the Applicant List program conducts a complete search, by both name and Social Security number, to see if the applicant has ever been in your agency's databases before. It searches all of its own active and inactive applicant records, as well as both current and previous tenant records in the Occupancy and Rent Calculation, Section 8 Tenant and Landlord, and Tenant Accounts Receivable modules.

If the search finds one or more matching records, the Add Applicant wizard continues to Step Three or Step Four. If it does not find a match, it skips to Step Seven, as Steps Three through Six only deal with data for applicants who already appear in your agency's files.

## Step Three

If the applicant's name or Social Security number matches that of an applicant who already exists in Applicant List's database, the wizard moves to Step Three. The program informs you that the applicant already has an active application.

Click the Cancel button to return to the Browse Applicants screen. Locate and edit the applicant's existing record instead of adding a new record for him.

## Step Four

If the applicant's name or Social Security number matches that of an applicant who already exists in the database of a program other than Applicant List, the wizard moves to Step Four. The wizard displays a list of all previous records for the applicant that exist in your agency's WinTen<sup>2</sup> system.

Click the Next button to proceed to Step Five.

**Add Applicant (Step 2 of 10)**

Confirm Applicant Social Security Number and Name

Social Security #: 351-75-1571

Applicant Name: CYNTHIA A BATES

**Instructions:**  
Please verify the applicant's name and Social Security Number. The program will now look through other related Tenmast Applicant and Tenant information in ALL data areas. This may take some time. Thank you for your patience!

<< Back   Next >>   Cancel

**Add Applicant (Step 3 of 10)**

Current Applicant Search Results

Social Security #: 648-61-1381

Applicant Name: CYNTHIA A BATES

**This applicant already has a current application**

**Instructions:**  
The applicant was found in this Applicant List data area. Please click the Cancel button and browse the Active or Inactive list of applicants, and maintain the applicant there.

<< Back   Next >>   Cancel

**Add Applicant (Step 4 of 10)**

Current / History Tenant Search Results

Social Security #: 834-88-3282

Applicant Name: JULIANA G CHARSKI

Print Search Results

| Data Area                    | Description                                                   |
|------------------------------|---------------------------------------------------------------|
| Public Housing Documentation | Current Occupancy and Rent tenant 834-88-3282 as of 2/06/2001 |

**Instructions:**  
The applicant was found in the above data areas and related Tenmast applications. This is for your information only.

<< Back   Next >>   Cancel

## Step Five

In Step Five, you can select a previously-existing set of personal data to copy into the applicant's current application. Use the drop-down selection box to select the existing set of data, or select the blank option if you don't want to use any existing data for this application.

Make your selection, then click the Next button to proceed to Step Six.

## Step Six

The Add Applicant wizard displays any unpaid balances that the applicant may have outstanding in your agency's financial records. You cannot edit any data on this screen - it is for informational purposes only.

Click the Next button to continue to Step Seven.

## Step Seven

The wizard allows you to enter more detailed information on the applicant. If you selected a previous record in Step Five, some of these data fields are already filled in.

Enter the applicant's household size, date of birth, gender, and ethnicity.

Use the Race set of check boxes to indicate the applicant's racial composition.

If the applicant is an emancipated minor, check the appropriate check box.

Click the Next button to continue to Step Eight.

### Hint: Step Five?

*Step Five is currently disabled while we finalize the database integration between Applicant List and other WinTen<sup>2</sup> programs. It will return in a future version of the program.*

The screenshot shows the 'Add Applicant (Step 6 of 10)' window. The title bar is 'Add Applicant (Step 6 of 10)'. The main area is titled 'Applicant Unpaid Balance Search Results'. It contains a 'Social Security #' field with the value '834-88-3282' and an 'Applicant Name' field with the value 'JULIANA G CHARSKI'. There is a 'Print Unpaid Balances' button. Below this is a table with three columns: 'Data Area', 'Description', and 'Amount'. The table contains one row: 'Public Housing Documentati...', '834-88-3282/JULIANA G CHARSKI in TAR Current Tenants unit 030', and '50.00'. At the bottom, there is an 'Instructions' section with the text: 'The applicant was found in the above data areas showing that they have/had unpaid balances due to you. This is for information only.' and buttons for '<< Back', 'Next >>', and 'Cancel'.

| Data Area                     | Description                                                   | Amount |
|-------------------------------|---------------------------------------------------------------|--------|
| Public Housing Documentati... | 834-88-3282/JULIANA G CHARSKI in TAR Current Tenants unit 030 | 50.00  |

The screenshot shows the 'Add Applicant (Step 7 of 10)' window. The title bar is 'Add Applicant (Step 7 of 10)'. The main area is titled 'Enter Other Applicant Data'. It contains several fields: 'Social Security #' with value '631-44-7845', 'Applicant Name' with value 'ROBERT B KLEIN', 'Household Size' with value '1', 'Birthdate' with value '02/21/1986', and a checked 'Emancipated Minor' checkbox. There is a 'Gender' dropdown menu set to 'Male'. Below this is a 'Race' section with a group of checkboxes: 'White', 'Black/African American' (checked), 'American Indian/Alaska Native', 'Asian', and 'Native Hawaiian/Other Pacific Islander'. There is also an 'Ethnicity' dropdown menu set to 'Not Hispanic or Latino'. At the bottom, there is an 'Instructions' section with the text: 'Enter other required data about the applicant' and buttons for '<< Back', 'Next >>', and 'Cancel'.

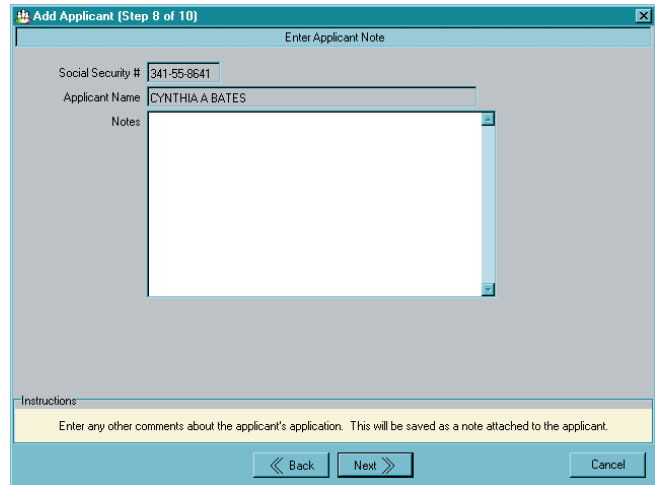
### Hint: Race

*If you check more than one box in the Race set of check boxes, the WinTen<sup>2</sup> programs mark the applicant as multi-racial for HUD reporting purposes.*

## Step Eight

The Add Applicant wizard allows you to enter notes on the applicant. The data field is a free-form text entry field. If any previous records or charges exist for the applicant, the program automatically enters notes on them here. Enter any additional notes you may have.

Click the Next button to continue to Step Nine.

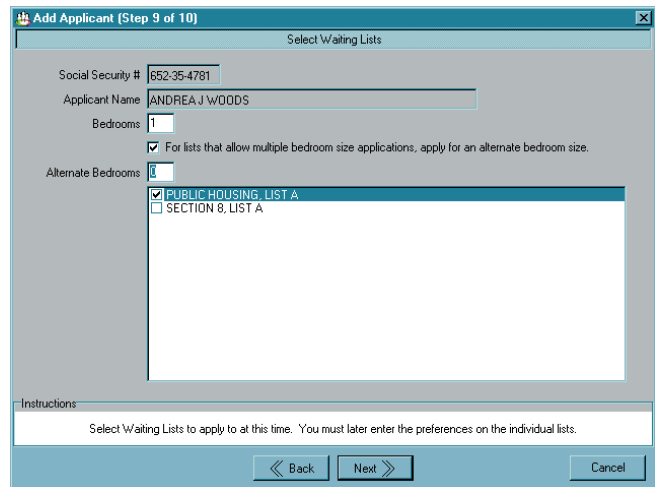


## Step Nine

The wizard displays a set of check boxes, one for each waiting list. Check the boxes that correspond to the waiting lists for which this applicant is applying.

If the applicant is applying for a waiting list that supports multiple bedroom sizes, check the appropriate box and enter the secondary bedroom size.

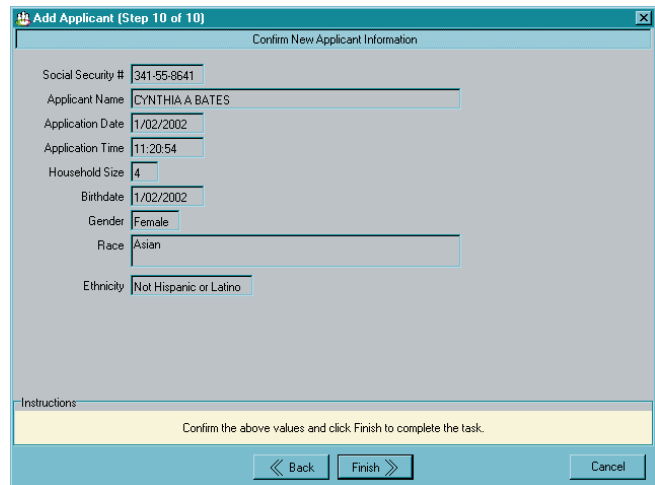
Click the Next button to proceed to Step Ten.



## Step Ten

The wizard displays all of the data you've entered for the applicant. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changed. If everything shown in Step Ten is correct, click the Finish button to complete the applicant addition process and save the data in a new applicant record.

If you click the Finish button, the Add Applicant sub-screen closes and the Maintain Applicants screen opens on the new applicant's record. For more information on the Maintain Applicants screen, see the Maintain Applicants chapter.



## Applying to a Waiting List

To process an applicant's addition to a specific waiting list, go to that applicant's record on the Maintain Applicants screen.

Go to the Lists Applied For tab.

Select the Apply to Waiting List option from the Other Functions menu. This opens the Apply to Waiting List Wizard.

## Apply to Waiting List Wizard

### Step One

Select the waiting list to which the applicant is applying and enter the date and time of the application.

Click the Start button to proceed to Step Two.

The screenshot shows the 'Apply to Waiting List (Step 1 of 4)' window. The title bar includes a close button. The window has a light blue background. At the top, there is a section titled 'Select Waiting List'. Below this, there are several input fields: 'Social Security #' with the value '492-19-4294', 'Applicant Name' with 'JOHN T BABCOCK', 'Waiting List' with a dropdown menu showing 'SECTION 8, LIST A', 'Application Date' with '09/17/2001' and a calendar icon, and 'Application Time' with '13:34:00'. At the bottom, there is an 'Instructions' section with a yellow background that says 'Select the waiting list, and enter the application date / time'. Below the instructions are two buttons: 'Start >>' and 'Cancel'.

### Step Two

Enter the number of bedrooms for which the applicant is applying. If the program did not fill in an application number, enter a number for this application.

Click the Next button to proceed to Step Three.

The screenshot shows the 'Apply to Waiting List (Step 2 of 4)' window. The title bar includes a close button. The window has a light blue background. At the top, there is a section titled 'Enter Bedrooms'. Below this, there are several input fields: 'Social Security #' with '492-19-4294', 'Applicant Name' with 'JOHN T BABCOCK', 'Waiting List' with 'SECTION 8, LIST A', 'Application Date' with '09/17/2001', 'Application Time' with '13:34:00', 'Application Number' with '0000000007', and 'Bedrooms' with a text box containing '1'. At the bottom, there is an 'Instructions' section with a yellow background that says 'Enter the application number and number of bedrooms'. Below the instructions are three buttons: '<< Back', 'Next >>', and 'Cancel'.

## Step Three

Check the box for each preference for which the applicant qualifies.

Click the Next button to proceed to Step Four.

The screenshot shows a software window titled "Apply to Waiting List [Step 3 of 4]". The window has a light blue background. At the top, there's a header bar with the title and standard window controls (minimize, maximize, close). Below the header, the main area is divided into sections. The first section is labeled "Enter Preferences" and contains three input fields: "Social Security #" with the value "492-19-4294", "Applicant Name" with the value "JOHN T BARCOCK", and "Waiting List" with the value "SECTION 8, LIST A". Below these fields is a list of preferences, each preceded by a checkbox. The checked items are "Lives in County", "Works in County", and "Veteran". There are also several unchecked checkboxes below these. At the bottom of the window, there is a yellow banner with the text "Instructions Check the preferences for which the applicant qualifies". Below the banner are three buttons: "<< Back", "Next >>", and "Cancel".

Apply to Waiting List [Step 3 of 4]

Enter Preferences

Social Security # 492-19-4294

Applicant Name JOHN T BARCOCK

Waiting List SECTION 8, LIST A

☒ Lives in County

☒ Works in County

☐ Homeless

☒ Veteran

☐

☐

☐

☐

☐

☐

☐

☐

☐

Instructions

Check the preferences for which the applicant qualifies

<< Back Next >>

Cancel

## Step Four

The wizard displays all of the data you've entered for the applicant. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Four is correct, click the Finish button to complete the process and save the applicant's entry for this waiting list.

**Apply to Waiting List [Step 4 of 4]**

Confirm Waiting List Data

Social Security # 492-19-4294

Applicant Name JOHN T BABCOCK

Waiting List SECTION 8, LIST A

Application Date 09/17/2001

Application Time 13:34:00

Application Number 0000000007

Bedrooms 1

Preference Weight 6 press Back to view or change the selected preferences

**Instructions**

Confirm the above values, and click Finish to complete the task

<< Back Finish >> Cancel

# Changing an Application's Effective Date

To change an application's effective date, go to the Lists Applied For tab of the Maintain Applicants screen. Select that application in the table at the top of the tab. Then select the Change Application Date Other Function. This opens the Change Application Date/Time wizard.

## Change Application Date/Time Wizard

### Step One

Enter the new effective date and time for the application and the date of the change action.

Click the Start button to proceed to Step Two.

Change Application Date / Time (Step 1 of 2)

Enter Revised Application Date / Time

Social Security # 492-19-4294

Applicant Name JOHN T BABCOCK

Waiting List PUBLIC HOUSING, LIST A

Bedrooms Ten1

New Application Date 09/18/2001

New Application Time 13:34:00

Action Date 09/20/2001

Start Cancel

### Step Two

The wizard displays all of the data you've entered for change. Review it. If you need to make any changes, click the Back button to go back to Step One and make those changes. If everything shown in Step Two is correct, click the Finish button to complete the change.

Change Application Date / Time (Step 2 of 2)

Confirm Revised Application Date / Time

Social Security # 492-19-4294

Applicant Name JOHN T BABCOCK

Waiting List PUBLIC HOUSING, LIST A

Bedrooms Ten1

New Application Date 9/18/2001

New Application Time 13:34:00

Action Date 9/20/2001

Instructions

Confirm the above values, and click Finish to complete the task

<< Back Finish >> Cancel

# Changing an Application's Requested Bedroom Size

To change the number of bedrooms requested in an application, go to the Lists Applied For tab of the Maintain Applicants screen. Select that application in the table at the top of the tab. Then select the Change Bedroom Size Other Function. This opens the Change Bedroom Size wizard.

## Change Bedroom Size Wizard

### Step One

Enter the new bedroom size for the application and the date of the change action.

Click the Start button to proceed to Step Two.

The screenshot shows a window titled "Change Bedroom Size (Step 1 of 2)" with a subtitle "Enter Revised Bedroom Size Requested". It contains several input fields: "Social Security #" with the value "492-19-4294", "Applicant Name" with "JOHN T BABCOCK", "Waiting List" with "PUBLIC HOUSING, LIST A", "Original Bedrooms" with "1", "Bedrooms" with "2", and "Action Date" with "09/20/2001". At the bottom right, there are two buttons: "Start" with a right-pointing arrow and "Cancel".

### Step Two

The wizard displays all of the data you've entered for change. Review it. If you need to make any changes, click the Back button to go back to Step One and make those changes. If everything shown in Step Two is correct, click the Finish button to complete the change.

The screenshot shows a window titled "Change Bedroom Size (Step 2 of 2)" with a subtitle "Confirm Revised Bedroom Size Requested". It displays the same data as Step One: "Social Security # 492-19-4294", "Applicant Name JOHN T BABCOCK", "Waiting List PUBLIC HOUSING, LIST A", "Original Bedrooms 1", "Bedrooms 2", and "Action Date 9/20/2001". Below the input fields is an "Instructions" section with a yellow background that says "Confirm the above values, and click Finish to complete the task". At the bottom right, there are three buttons: "<< Back", "Finish >>", and "Cancel".

# Removing an Applicant from a Waiting List

To remove an applicant from a waiting list, go to the Lists Applied For tab of the Maintain Applicant screen. Select the waiting list from which you want to remove the applicant. Then click the Delete button, press <Ctrl+D>, or select the Remove from Waiting List Other Function. This opens the Remove from Waiting List Wizard.

## Remove from Waiting List Wizard

### Step One

Enter the effective date of the removal.

Click the Start button to proceed to Step Two.

The screenshot shows the first step of the wizard. The title bar is 'Remove From Waiting List (Step 1 of 3)'. The main area has a header 'Enter Date Removed'. Below it are several input fields: 'Social Security #' with value '492-19-4294', 'Applicant Name' with 'JOHN T BABCOCK', 'Waiting List' with 'SECTION 8, LIST A', 'Bedrooms' with '1', 'Application Date' with '9/17/2001', 'Application Time' with '13:34:00', and 'Action Date' with '09/19/2001'. At the bottom, there is an 'Instructions' box with the text 'Enter date that applicant requested to be removed from this waiting list'. Below the instructions are 'Start' and 'Cancel' buttons.

### Step Two

Enter any necessary notes on the removal. The program will save this information as a note attached to the applicant's record.

Click the Next button to proceed to Step Three.

The screenshot shows the second step of the wizard. The title bar is 'Remove From Waiting List (Step 2 of 3)'. The main area has a header 'Enter Explanation for Removal from Waiting List'. Below it are the same input fields as in Step 1. The 'Explanation' field is a text area containing the text 'operator error, accidentally entered on wrong waiting list'. At the bottom, there is an 'Instructions' box with the text 'Enter any comments regarding their removal from the list. This will be saved as a note attached to the applicant.' Below the instructions are '<< Back', 'Next >>', and 'Cancel' buttons.

### Step Three

The wizard displays all of the data you've entered for the removal process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changed. If everything shown in Step Three is correct, click the Finish button to complete the process and remove the applicant from the selected waiting list.

The screenshot shows the third step of the wizard. The title bar is 'Remove From Waiting List (Step 3 of 3)'. The main area has a header 'Confirm Removal from Waiting List'. Below it are the same input fields as in Step 1. Below the input fields is a line of text: 'An explanatory note will be added - Press Back to see its text'. At the bottom, there is an 'Instructions' box with the text 'Confirm the above values, and click Finish to complete the task'. Below the instructions are '<< Back', 'Finish >>', and 'Cancel' buttons.

## Marking an Applicant as Ineligible for a Waiting List

To remove an applicant from a waiting list, go to the Lists Applied For tab of the Maintain Applicant screen. Select the waiting list for which you want to mark the applicant as ineligible. Then select the Mark as Ineligible Other Function. This opens the Remove from Waiting List Wizard.

### Hint: Ineligibility

*If you mark an applicant as ineligible for the last waiting list he is on, the program moves him from active status to inactive status. To return him to active status, add him to another waiting list.*

### Hint: What's the difference between removing an applicant and marking him as ineligible?

*The program has two separate functions to take an applicant off a waiting list. Tenmast separates these for audit purposes. If an applicant doesn't want to be on a waiting list (including a data entry error that accidentally added him to the wrong list), remove him. If he can't legally be on a waiting list, mark him as ineligible.*

## Mark as Ineligible Wizard

### Step One

Enter the date that your agency determined that the applicant was ineligible to be housed on this waiting list.

Click the Start button to proceed to Step Two.

**Mark As Ineligible (Step 1 of 3)**

Enter Date Determined to be Ineligible

Social Security # 451-34-8661

Applicant Name DONALD P GRABOWSKI

Waiting List PUBLIC HOUSING, LIST A

Bedrooms 3

Application Date 9/21/2001

Application Time 16:07:00

Action Date 10/23/2001

Instructions

Enter date you determined that the applicant was ineligible to be housed from this waiting list

Start >> Cancel

## Step Two

Enter any notes that you need to record on the reason the applicant is being marked as ineligible. The program will save this information as a note attached to the applicant's record.

Click the Next button to proceed to Step Three.

The screenshot shows a Windows-style dialog box titled "Mark As Ineligible (Step 2 of 3)". The main heading is "Enter Explanation for Marking Ineligible". Below this, there are several input fields: "Social Security #" with the value "451-34-8661", "Applicant Name" with "DONALD P GRABOWSKI", "Waiting List" with "PUBLIC HOUSING, LIST A", and "Bedrooms" with "3". A large text area for "Explanation" contains the text "Applicant has outstanding debts under name of 'D. Peter Grabowski.'" Below the input fields is an "Instructions" section with a yellow background, stating: "Enter any comments about why the applicant is ineligible. This will be saved as a note attached to the applicant." At the bottom, there are three buttons: "<< Back", "Next >>", and "Cancel".

## Step Three

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Three is correct, click the Finish button to complete the process and mark the applicant as ineligible for the selected waiting list.

The screenshot shows a Windows-style dialog box titled "Mark As Ineligible (Step 3 of 3)". The main heading is "Confirm Date Determined to be Ineligible". Below this, the same data from Step 2 is displayed: "Social Security #" (451-34-8661), "Applicant Name" (DONALD P GRABOWSKI), "Waiting List" (PUBLIC HOUSING, LIST A), and "Bedrooms" (3). Additionally, there are three more fields: "Application Date" (9/21/2001), "Application Time" (16:07:00), and "Action Date" (10/23/2001). Below these fields is a message: "An explanatory note will be added - Press Back to see its text". An "Instructions" section with a yellow background states: "Confirm the above values, and click Finish to complete the task". At the bottom, there are three buttons: "<< Back", "Finish >>", and "Cancel".

# Making a Unit Offer

You can make a unit offer to a selected applicant from two places in the program:

- Go to the Lists Applied For tab of the Maintain Applicant screen, select the applicant to whom you want to extend the unit offer, and select the Make Unit Offer Other Function.
- Go to the Process Waiting List screen, select the applicant to whom you want to extend the unit offer, and select the Make Unit Offer Other Function.

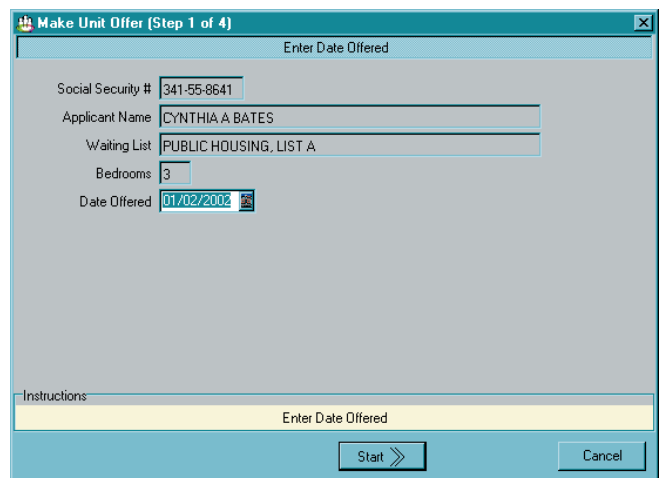
Either of these options opens the Make Unit Offer wizard.

## Make Unit Offer Wizard

### Step One

Enter the effective date of the offer.

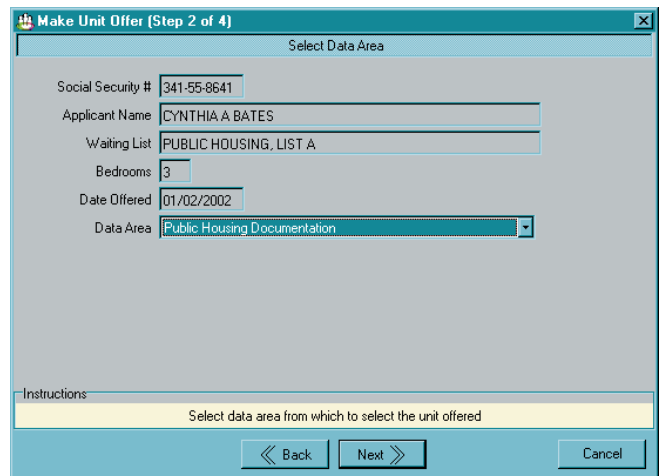
Click the Start button to proceed to Step Two.



### Step Two

Use the Data Area drop-down selection box to specify the data area that contains the data on the unit that is being offered.

Click the Next button to proceed to Step Three.



## Step Three

Enter the unit number for the unit that is being offered.

**Make Unit Offer (Step 3 of 4)**

Select Unit Information

Social Security # 341-55-8641

Applicant Name CYNTHIA A BATES

Waiting List PUBLIC HOUSING, LIST A

Bedrooms 3

Date Offered 01/02/2002

Data Area Public Housing Documentation

Unit Number 025

Address 1550 ARMSTRONG MILL RD

City, State, Zip LEXINGTON KY 40517

Instructions: Enter unit number offered or press the search button to browse list of units

<< Back Next >> Cancel

If you don't know the unit number, click the magnifying glass button next to the Unit Number field to open the Browse Master Units dialog box. Select the offered unit and click the Select button. The Select Unit dialog box closes.

Click the Next button to proceed to Step Four.

**Browse Master Units**

Search For Go

| Unit Number | Beds | Status | Cond | Address                | City      |
|-------------|------|--------|------|------------------------|-----------|
| 014         | 0    | O      | A    | 125 TATES CREEK RD #6  | LEXINGTON |
| 015         | 1    | O      | A    | 125 TATES CREEK RD #7  | LEXINGTON |
| 016         | 1    | O      | A    | 125 TATES CREEK RD #8  | LEXINGTON |
| 017         | 3    | O      | A    | 127 TATES CREEK RD #1  | LEXINGTON |
| 018         | 3    | O      | A    | 127 TATES CREEK RD #2  | LEXINGTON |
| 019         | 3    | O      | A    | 127 TATES CREEK RD #3  | LEXINGTON |
| 020         | 3    | O      | A    | 127 TATES CREEK RD #4  | LEXINGTON |
| 021         | 0    | O      | A    | 127 TATES CREEK RD #5  | LEXINGTON |
| 022         | 0    | O      | A    | 127 TATES CREEK RD #6  | LEXINGTON |
| 023         | 0    | O      | A    | 127 TATES CREEK RD #7  | LEXINGTON |
| 024         | 0    | O      | A    | 127 TATES CREEK RD #8  | LEXINGTON |
| 025         | 3    | O      | A    | 1550 ARMSTRONG MILL RD | LEXINGTON |
| 026         | 3    | V      | A    | 1552 ARMSTRONG MILL RD | LEXINGTON |
| 027         | 3    | V      | A    | 1554 ARMSTRONG MILL RD | LEXINGTON |
| 028         | 3    | O      | A    | 1556 ARMSTRONG MILL RD | LEXINGTON |
| 029         | 3    | O      | A    | 1558 ARMSTRONG MILL RD | LEXINGTON |

Select Cancel

## Step Four

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changed. If everything shown in Step Four is correct, click the Finish button to complete the process and complete the unit offer. The program records the offer as completed.

**Make Unit Offer (Step 4 of 4)**

Confirm Unit Offer Information

Social Security # 341-55-8641

Applicant Name CYNTHIA A BATES

Waiting List PUBLIC HOUSING, LIST A

Bedrooms 3

Date Offered 01/02/2002

Data Area Public Housing Documentation

Unit Number 025

Address 1550 ARMSTRONG MILL RD

City, State, Zip LEXINGTON KY 40517

Instructions: Confirm the above values, and click Finish to complete the task

<< Back Finish >> Cancel

# Issuing a Voucher

You can issue a Section 8 voucher to a selected applicant from two places in the program:

- Go to the Lists Applied For tab of the Maintain Applicant screen, select the applicant to whom you want to issue the voucher, and select the Issue Voucher Other Function.
- Go to the Process Waiting List screen, select the applicant to whom you want to issue the voucher, and select the Issue Voucher Other Function.

Either of these options opens the Issue Voucher wizard.

## Issue Voucher Wizard

### Step One

Enter the date the voucher was issued and the bedroom size for which it was issued.

Click the Start button to continue to Step Two.

Issue Voucher (Step 1 of 5)

Select Waiting List and Bedrooms

Social Security # EditSSN1

Applicant Name MARISSA P KIM

Waiting List SECTION 8, LIST A

Date Issued 10/23/2001

Bedrooms 1

Instructions

Enter the Date Issued and the Bedroom Size

Start >> Cancel

### Step Two

Select the data area in which to record the voucher's issuance.

Click the Next button to proceed to Step Three.

Issue Voucher (Step 2 of 5)

Select Data Area

Social Security # EditSSN2

Applicant Name MARISSA P KIM

Waiting List SECTION 8, LIST A

Date Issued 10/23/2001

Bedrooms 1

Data Area Section 8 Documentation

Instructions

Select data area from which to issue voucher

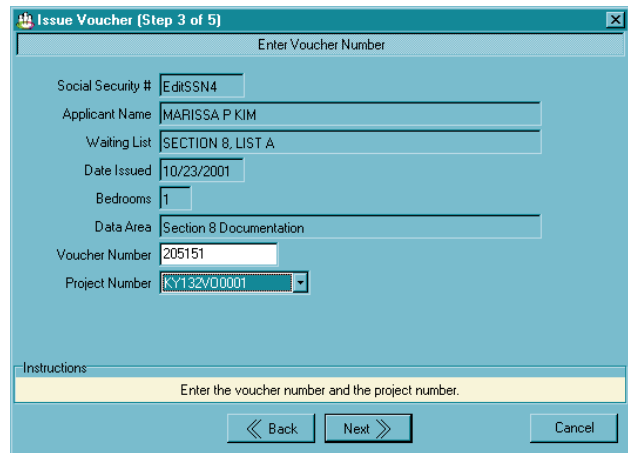
<< Back Next >> Cancel

## Step Three

Enter the voucher number and select the project to which it belongs.

If you have turned on Section 8 voucher tracking in the Section 8 Tenant and Landlord program, the Voucher Number field has a magnifying glass icon next to it. Click this icon to open the Select Open Vouchers dialog box, which enables you to select an open voucher from the list of open vouchers in Section 8's voucher database.

When you have entered the voucher number, click the Next button to proceed to Step Four.



Issue Voucher (Step 3 of 5)

Enter Voucher Number

Social Security # EditSSN4

Applicant Name MARISSA P KIM

Waiting List SECTION 8, LIST A

Date Issued 10/23/2001

Bedrooms 1

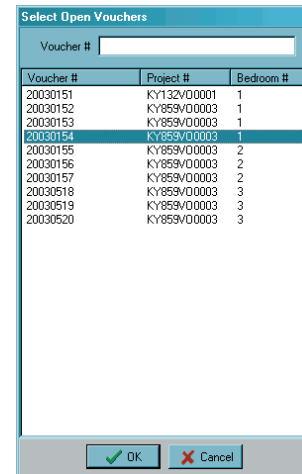
Data Area Section 8 Documentation

Voucher Number 205151

Project Number KY132V00001

Instructions: Enter the voucher number and the project number.

<< Back Next >> Cancel



Select Open Vouchers

Voucher #

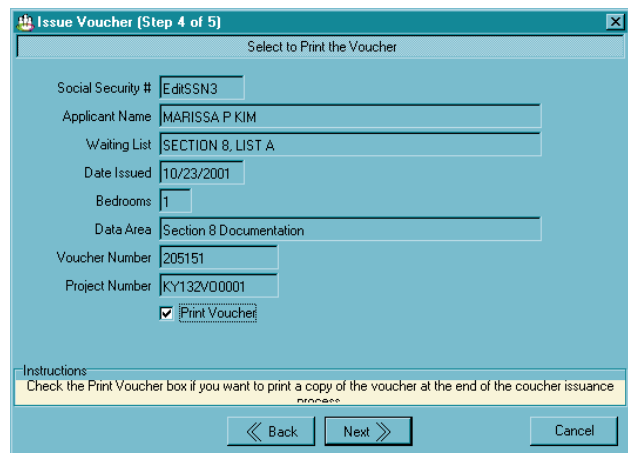
| Voucher # | Project #   | Bedroom # |
|-----------|-------------|-----------|
| 20030151  | KY132V00001 | 1         |
| 20030152  | KY859V00003 | 1         |
| 20030153  | KY859V00003 | 1         |
| 20030154  | KY859V00003 | 1         |
| 20030155  | KY859V00003 | 2         |
| 20030156  | KY859V00003 | 2         |
| 20030157  | KY859V00003 | 2         |
| 20030518  | KY859V00003 | 3         |
| 20030519  | KY859V00003 | 3         |
| 20030520  | KY859V00003 | 3         |

OK Cancel

## Step Four

If you want to print a copy of the voucher when you finish the voucher issuance process, check the Print Voucher box.

Click the Next button to proceed to Step Five.



Issue Voucher (Step 4 of 5)

Select to Print the Voucher

Social Security # EditSSN3

Applicant Name MARISSA P KIM

Waiting List SECTION 8, LIST A

Date Issued 10/23/2001

Bedrooms 1

Data Area Section 8 Documentation

Voucher Number 205151

Project Number KY132V00001

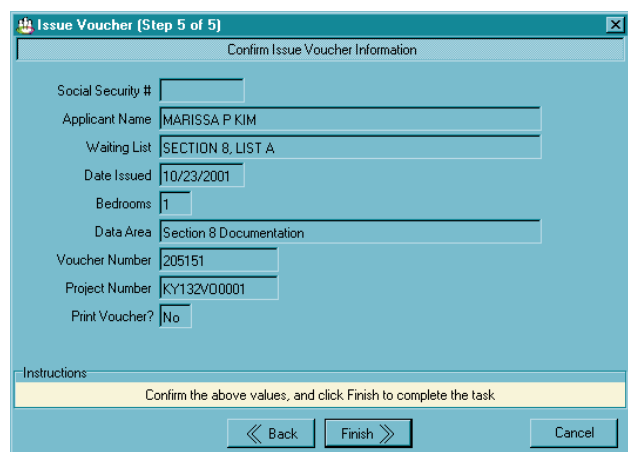
☒ Print Voucher

Instructions: Check the Print Voucher box if you want to print a copy of the voucher at the end of the voucher issuance process.

<< Back Next >> Cancel

## Step Five

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Five is correct, click the Finish button to complete the process and issue (and print, if you selected that option) the voucher.



Issue Voucher (Step 5 of 5)

Confirm Issue Voucher Information

Social Security #

Applicant Name MARISSA P KIM

Waiting List SECTION 8, LIST A

Date Issued 10/23/2001

Bedrooms 1

Data Area Section 8 Documentation

Voucher Number 205151

Project Number KY132V00001

Print Voucher? No

Instructions: Confirm the above values, and click Finish to complete the task.

<< Back Finish >> Cancel

# Accepting a Unit Offer

To record an applicant's acceptance of a unit offer, go to the Unit Offers/Vouchers tab of the Maintain Applicant screen. Select the offer that the applicant has accepted. Then select the Accept Offer Other Function. This opens the Accept Offer Wizard.

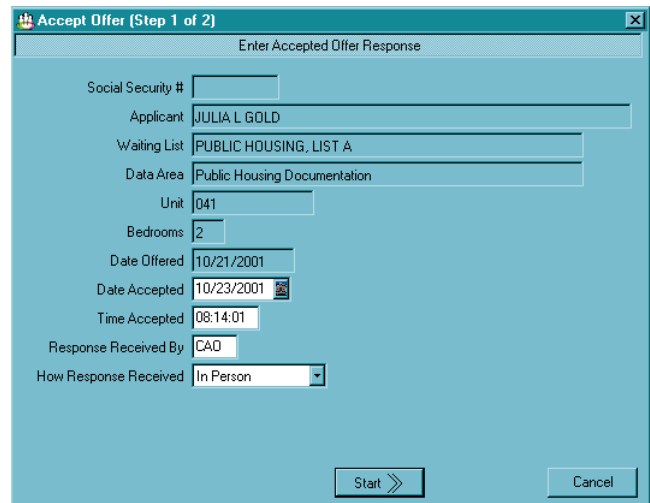
## Accept Offer Wizard

### Step One

The program automatically fills in the current date and time for the date and time of the acceptance, and your initials for the initials of the individual who received the applicant's response. If the actual values for these fields are different from the default values, make the necessary changes.

In the How Response Received drop-down selection box, select the manner in which your agency received the applicant's response.

Click the Start button to proceed to Step Two.



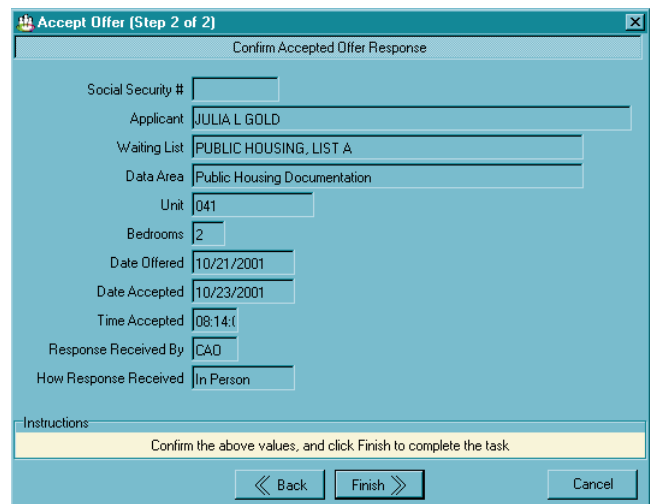
The 'Accept Offer (Step 1 of 2)' dialog box is titled 'Enter Accepted Offer Response'. It contains the following fields and values:

| Field                 | Value                        |
|-----------------------|------------------------------|
| Social Security #     |                              |
| Applicant             | JULIA L GOLD                 |
| Waiting List          | PUBLIC HOUSING, LIST A       |
| Data Area             | Public Housing Documentation |
| Unit                  | 041                          |
| Bedrooms              | 2                            |
| Date Offered          | 10/21/2001                   |
| Date Accepted         | 10/23/2001                   |
| Time Accepted         | 08:14:01                     |
| Response Received By  | CAO                          |
| How Response Received | In Person                    |

At the bottom right, there are two buttons: 'Start >>' and 'Cancel'.

### Step Two

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Two is correct, click the Finish button to complete the process and record the applicant's acceptance of the offer.



The 'Accept Offer (Step 2 of 2)' dialog box is titled 'Confirm Accepted Offer Response'. It displays the same data as Step 1, with the following fields and values:

| Field                 | Value                        |
|-----------------------|------------------------------|
| Social Security #     |                              |
| Applicant             | JULIA L GOLD                 |
| Waiting List          | PUBLIC HOUSING, LIST A       |
| Data Area             | Public Housing Documentation |
| Unit                  | 041                          |
| Bedrooms              | 2                            |
| Date Offered          | 10/21/2001                   |
| Date Accepted         | 10/23/2001                   |
| Time Accepted         | 08:14:01                     |
| Response Received By  | CAO                          |
| How Response Received | In Person                    |

Below the data fields is an 'Instructions' section with the text: 'Confirm the above values, and click Finish to complete the task.' At the bottom, there are three buttons: '<< Back', 'Finish >>', and 'Cancel'.

# Rejecting a Unit Offer

To record an applicant's rejection of a unit offer, go to the Unit Offers/Vouchers tab of the Maintain Applicant screen. Select the offer that the applicant has rejected. Then select the Reject Offer Other Function. This opens the Reject Offer Wizard.

## Reject Offer Wizard

### Step One

If the date and time of the rejection differ from the current date and time, change the Action Date/Time fields to be correct.

If the initials or user name of the individual recording the rejection differ from those shown in the Response Received By field, change this field to be correct.

Use the How Response Received drop-down selection box to indicate how your agency received the applicant's offer rejection.

Click the Start button to proceed to Step Two.

**Reject Offer (Step 1 of 4)**

Enter Rejected Offer Response Date

Social Security #

Applicant JOHN T BABCOCK

Waiting List PUBLIC HOUSING, LIST A

Bedrooms 1

Data Area Public Housing Documentation

Unit 002

Date Offered 9/25/2001

Action Date / Time 09/27/2001 10:49:08

Response Received By CAO

How Response Received In Person

Instructions: Enter date applicant rejected unit offer and how they communicated the rejection

Start Cancel

### Step Two

Step Two only appears if this is the last permitted rejection for this applicant on this waiting list, as set up on the Waiting Lists tab of the Setup screen.

The wizard reminds you that this rejection will change the applicant's position on the waiting list. The Days to Add to Action Date field shows how many days the applicant's effective date on this waiting list will be moved back.

Click the Next button to proceed to Step Three.

**Reject Offer (Step 2 of 4)**

Enter Rejected Offer Response Date

Social Security #

Applicant JOHN T BABCOCK

Waiting List PUBLIC HOUSING, LIST A

Bedrooms 1

Data Area Public Housing Documentation

Unit 002

Date Offered 9/25/2001

Current Application Date

Current Application Time

Action Date / Time 09/27/2001 10:51:12

Days To Add to Action Date 90

New Application Date 12/26/2001

New Application Time 21:44:12

This rejection will cause their Application Date / Time to this waiting list to be updated. The effect of this change will be to move them down towards the bottom.

Instructions: Acknowledge that the applicant's position on the list will be changed

<< Back Next >> Cancel

## Step Three

Enter any notes on the unit offer rejection.

Click the Next button to proceed to Step Four.

Reject Offer (Step 3 of 4)

Enter Notes

Social Security #

Applicant

Waiting List

Bedrooms

Data Area

Unit

Date Offered

Explanation

<< Back   Next >>   Cancel

## Step Four

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Four is correct, click the Finish button to complete the process and record the applicant's rejection of the unit offer.

Reject Offer (Step 4 of 4)

Confirm Rejected Offer Response

Social Security #

Applicant

Waiting List

Data Area

Unit

Bedrooms

Date Offered

Date / Time Rejected

Response Received By

How Response Received

Current Application Date

Current Application Time

New Application Date

New Application Time

An explanatory note will be added - Click Back to see its text

Instructions

Confirm the above values, and click Finish to complete the task

<< Back   Finish >>   Cancel

# Extending an Active Voucher

To extend the expiration date of a Section 8 voucher, go to the Unit Offers/Vouchers tab of the Maintain Applicant screen. Select the voucher that you want to extend. Then select the Extend Voucher Other Function. This opens the Extend Voucher wizard.

## Extend Voucher Wizard

### Step One

Enter the number of days by which you want to extend the voucher and the effective date of this extension.

Click the Start button to proceed to step Two.

**Extend Voucher (Step 1 of 3)**  
Enter Extended Voucher Expiration Date

Social Security # 492-19-4294  
Applicant Name JOHN T BABCOCK  
Waiting List SECTION 8, LIST A  
Bedrooms 1  
Data Area Section 8 Documentation  
Voucher Number 611654  
Date Issued 9/27/2001  
Days to Extend 60  
Action Date 09/27/2001  
Current Expiration Date 11/26/2001

Start Cancel

### Step Two

Enter any notes on the voucher extension.

Click the Next button to proceed to Step Three.

**Extend Voucher (Step 2 of 3)**  
Enter Notes

Social Security # 492-19-4294  
Applicant Name JOHN T BABCOCK  
Waiting List SECTION 8, LIST A  
Data Area Section 8 Documentation  
Date Issued 9/27/2001  
Current Expiration Date 11/26/2001  
New Expiration Date 12/26/2001  
Explanation standard extension - applicant unable to find anything in 60 days

<< Back Next >> Cancel

### Step Three

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Three is correct, click the Finish button to complete the process and record the voucher extension.

**Extend Voucher (Step 3 of 3)**  
Confirm Extended Voucher Expiration Date

Social Security # 492-19-4294  
Applicant Name JOHN T BABCOCK  
Waiting List SECTION 8, LIST A  
Bedrooms 1  
Data Area Section 8 Documentation  
Voucher Number 611654  
Date Issued 9/27/2001  
Days to Extend 60  
Action Date 09/27/2001  
Current Expiration Date 11/26/2001  
New Expiration Date 12/26/2001

An explanatory note will be added - Click Back to see its text

Instructions  
Confirm the above values, and click Finish to complete the task

<< Back Finish >> Cancel

# Marking a Voucher as Expired

To mark a Section 8 voucher as expired, go to the Unit Offers/Vouchers tab of the Maintain Applicant screen. Select the voucher that has expired. Then select the Expire Voucher Other Function. This opens the Mark Voucher as Expired wizard.

## Mark Voucher as Expired Wizard

### Step One

Enter the date on which the voucher expired.

Click the Start button to proceed to Step Two.

Mark Voucher as Expired (Step 1 of 3)

Enter Date Voucher Marked Expired

Social Security # 741-35-3107

Applicant MARISSA P KIM

Waiting List SECTION 8, LIST A

Bedrooms 1

Data Area Section 8 Documentation

Voucher Number 205151

Date Issued 10/23/2001

Date Expires 12/22/2001

Action Date 10/23/2001

Start Cancel

### Step Two

Step Two only appears if this is the last permitted voucher expiration for this applicant on this waiting list, as set up on the Waiting Lists tab of the Setup screen.

The wizard reminds you that this expiration will change the applicant's position on the waiting list. The Days to Add to Action Date field shows how many days the applicant's effective date on this waiting list will be moved back.

Click the Next button to proceed to Step Three.

Mark Voucher as Expired (Step 2 of 3)

Confirm Expiration Will Change Application Date

Social Security # 741-35-3107

Applicant MARISSA P KIM

Waiting List SECTION 8, LIST A

Current Application Date 8/02/2001

Current Application Time 11:27:00

Action Date 10/23/2001

Days To Add to Action Date 30

New Application Date 11/22/2001

New Application Time 09:18:52

This rejection will cause their Application Date / Time to this waiting list to be updated. The effect of this change will be to move them down towards the bottom.

<< Back Next >> Cancel

### Step Three

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changed. If everything shown in Step Three is correct, click the Finish button to complete the process and record the voucher's expiration.

Mark Voucher as Expired (Step 3 of 3)

Confirm Date Voucher Marked Expired

Social Security # 741-35-3107

Applicant MARISSA P KIM

Waiting List SECTION 8, LIST A

Bedrooms 1

Data Area Section 8 Documentation

Voucher Number 205151

Date Issued 10/23/2001

Date Expires 12/22/2001

Action Date 10/23/2001

Current Application Date 8/02/2001

Current Application Time 11:27:00

New Application Date 11/22/2001

New Application Time 09:18:52

Instructions

Confirm the above values, and click Finish to complete the task.

<< Back Finish >> Cancel

# Housing a Public Housing Applicant

You can house a public housing applicant from three places in the program:

- Go to the Lists Applied For tab of the Maintain Applicant screen, select the waiting list from which to house the applicant, and select the House Applicant Other Function.
- Go to the Unit Offers/Vouchers tab of the Maintain Applicant screen, select the offer from which to house the applicant, and select the House Applicant Other Function.
- Go to the Process Waiting List screen, select the applicant to whom you want to issue the voucher, and select the House Applicant Other Function.

Any of these options opens the House Applicant wizard.

## House Applicant Wizard

### Step One

Enter the number of bedrooms in the unit in which you are housing the applicant.

Click the Start button to proceed to Step Two.

House Applicant (Step 1 of 6)

Select Waiting List and Bedrooms

Social Security # 517-44-8156

Applicant Name ENRICO M CHIVADORI

Waiting List PUBLIC HOUSING, LIST A

Bedrooms 2

Start >> Cancel

### Step Two

Use the Data Area drop-down selection box to specify the data area in which the applicant's data will be stored.

Click the Next button to proceed to Step Three.

House Applicant (Step 2 of 6)

Select Data Area

Social Security # 517-44-8156

Applicant Name ENRICO M CHIVADORI

Waiting List PUBLIC HOUSING, LIST A

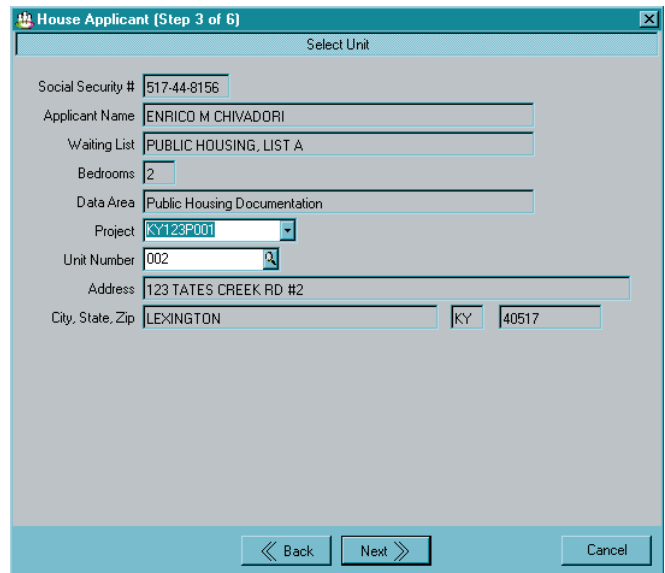
Bedrooms 2

Data Area Public Housing Documentation

<< Back Next >> Cancel

## Step Three

Enter the number of the unit into which the applicant is moving.



House Applicant (Step 3 of 6)

Select Unit

Social Security #: 517-44-8156

Applicant Name: ENRICO M CHIVADORI

Waiting List: PUBLIC HOUSING, LIST A

Bedrooms: 2

Data Area: Public Housing Documentation

Project: KY123P001

Unit Number: 002

Address: 123 TATES CREEK RD #2

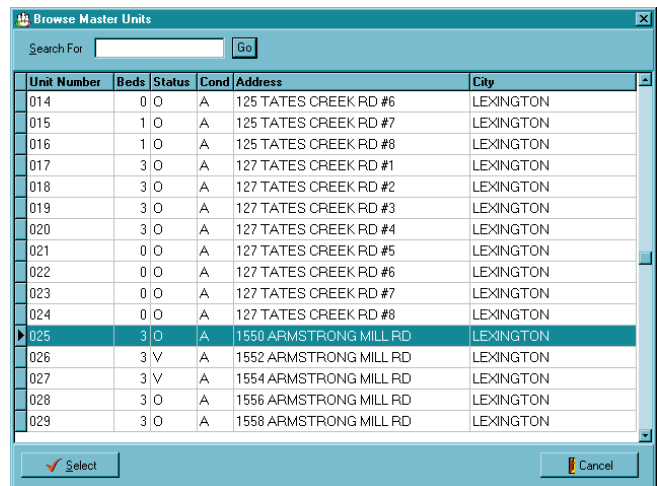
City, State, Zip: LEXINGTON KY 40517

Buttons: << Back, Next >>, Cancel

If you don't know the unit number, click the magnifying glass button next to the Unit Number data field. This opens the Master Unit Browse dialog box, which contains a table of every unit in the data area you selected in Step Two that matches the bedroom size you selected in Step One. Select the unit into which the applicant is moving and click the Select button. The dialog box closes.

Click the Next button to proceed to Step Five.

**NOTE: The program skips Step Four if you are housing a public housing applicant.**



Browse Master Units

Search For: [ ] Go

| Unit Number | Beds | Status | Cond | Address                | City      |
|-------------|------|--------|------|------------------------|-----------|
| 014         | 0    | O      | A    | 125 TATES CREEK RD #6  | LEXINGTON |
| 015         | 1    | O      | A    | 125 TATES CREEK RD #7  | LEXINGTON |
| 016         | 1    | O      | A    | 125 TATES CREEK RD #8  | LEXINGTON |
| 017         | 3    | O      | A    | 127 TATES CREEK RD #1  | LEXINGTON |
| 018         | 3    | O      | A    | 127 TATES CREEK RD #2  | LEXINGTON |
| 019         | 3    | O      | A    | 127 TATES CREEK RD #3  | LEXINGTON |
| 020         | 3    | O      | A    | 127 TATES CREEK RD #4  | LEXINGTON |
| 021         | 0    | O      | A    | 127 TATES CREEK RD #5  | LEXINGTON |
| 022         | 0    | O      | A    | 127 TATES CREEK RD #6  | LEXINGTON |
| 023         | 0    | O      | A    | 127 TATES CREEK RD #7  | LEXINGTON |
| 024         | 0    | O      | A    | 127 TATES CREEK RD #8  | LEXINGTON |
| 025         | 3    | O      | A    | 1550 ARMSTRONG MILL RD | LEXINGTON |
| 026         | 3    | V      | A    | 1552 ARMSTRONG MILL RD | LEXINGTON |
| 027         | 3    | V      | A    | 1554 ARMSTRONG MILL RD | LEXINGTON |
| 028         | 3    | O      | A    | 1556 ARMSTRONG MILL RD | LEXINGTON |
| 029         | 3    | O      | A    | 1558 ARMSTRONG MILL RD | LEXINGTON |

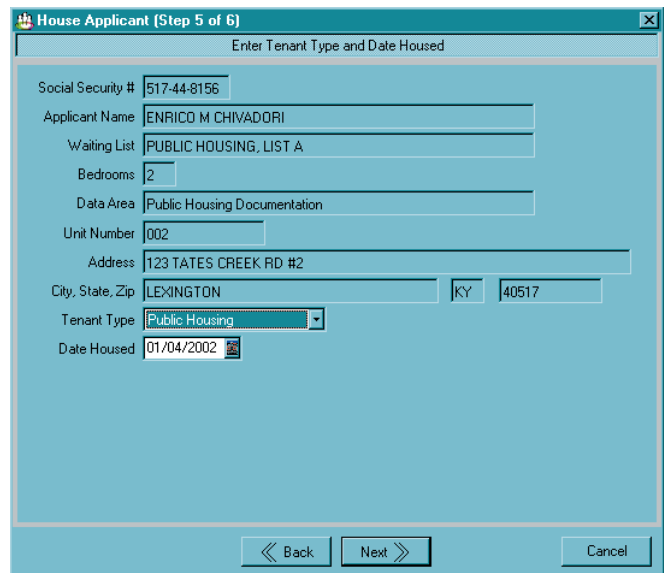
Buttons: Select, Cancel

## Step Five

Use the Tenant Type drop-down selection box to specify the tenant type of the applicant: public housing or Indian housing.

Enter the date on which the applicant became housed in the Date Housed field.

Click the Next button to proceed to Step Six.



House Applicant (Step 5 of 6)

Enter Tenant Type and Date Housed

Social Security #: 517-44-8156

Applicant Name: ENRICO M CHIVADORI

Waiting List: PUBLIC HOUSING, LIST A

Bedrooms: 2

Data Area: Public Housing Documentation

Unit Number: 002

Address: 123 TATES CREEK RD #2

City, State, Zip: LEXINGTON KY 40517

Tenant Type: Public Housing

Date Housed: 01/04/2002

Buttons: << Back, Next >>, Cancel

## Step Six

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Six is correct, click the Finish button to complete the process and house the applicant.

The screenshot shows a software window titled "House Applicant (Step 6 of 6)". The main area is titled "Confirm House Applicant Information" and contains the following fields:

|                   |                              |    |       |
|-------------------|------------------------------|----|-------|
| Social Security # | 517-44-8156                  |    |       |
| Applicant Name    | ENRICO M CHIVADORI           |    |       |
| Waiting List      | PUBLIC HOUSING, LIST A       |    |       |
| Bedrooms          | 2                            |    |       |
| Data Area         | Public Housing Documentation |    |       |
| Unit Number       | 002                          |    |       |
| Address           | 123 TATES CREEK RD #2        |    |       |
| City, State, Zip  | LEXINGTON                    | KY | 40517 |
| Tenant Type       | Public Housing               |    |       |
| Date Housed       | 01/04/2002                   |    |       |

Below the fields is an "Instructions" section with the text: "Confirm the above values, and click Finish to complete the task". At the bottom are three buttons: "<< Back", "Finish >>", and "Cancel".

# Housing a Section 8 Applicant

You can house a Section 8 applicant from three places in the program:

- Go to the Lists Applied For tab of the Maintain Applicant screen, select the waiting list from which to house the applicant, and select the House Applicant Other Function.
- Go to the Unit Offers/Vouchers tab of the Maintain Applicant screen, select the offer from which to house the applicant, and select the House Applicant Other Function.
- Go to the Process Waiting List screen, select the applicant to whom you want to issue the voucher, and select the House Applicant Other Function.

Any of these options opens the House Applicant wizard.

## House Applicant Wizard

### Step One

Enter the number of bedrooms in the unit in which you are housing the applicant.

Click the Start button to proceed to Step Two.

House Applicant (Step 1 of 6)

Select Waiting List and Bedrooms

Social Security # 517-44-8156

Applicant Name ENRICO M CHIVADORI

Waiting List SECTION 8, LIST A

Bedrooms 1

Start >> Cancel

### Step Two

Use the Data Area drop-down selection box to specify the data area in which the applicant's data will be stored.

Click the Next button to proceed to Step Four.

**NOTE: The program skips Step Three if you are housing a Section 8 applicant.**

House Applicant (Step 2 of 6)

Select Data Area

Social Security # 517-44-8156

Applicant Name ENRICO M CHIVADORI

Waiting List SECTION 8, LIST A

Bedrooms 1

Data Area Section 8 Documentation

<< Back Next >> Cancel

## Step Four

Enter the voucher information (voucher number, project, and voucher address) for the applicant you are housing.

Click the Next button to proceed to Step Five.

House Applicant (Step 4 of 6)

Select Voucher Address Information

Social Security # 517-44-8156

Applicant Name ENRICO M CHIVADORI

Waiting List SECTION 8, LIST A

Bedrooms 1

Data Area Section 8 Documentation

Voucher 12135141

Project KY132VD0001

Address 3569 PIMLICO PKWY APT 4

City, State, Zip LEXINGTON KY 40517

<< Back Next >> Cancel

## Step Five

Use the Tenant Type drop-down selection box to specify the tenant type of the applicant: Section 8 voucher, housing choice voucher, Section 8 mod rehab, Section 8 certificate, or Section 8 homeownership.

Enter the date on which the applicant became housed in the Date Housed field.

Click the Next button to proceed to Step Six.

House Applicant (Step 5 of 6)

Enter Tenant Type and Date Housed

Social Security # 517-44-8156

Applicant Name ENRICO M CHIVADORI

Waiting List SECTION 8, LIST A

Bedrooms 1

Data Area Section 8 Documentation

Voucher 12135141

Project KY132VD0001

Address 3569 PIMLICO PKWY APT 4

City, State, Zip LEXINGTON KY 40517

Tenant Type Section 8 Voucher

Date Housed 01/04/2002

<< Back Next >> Cancel

## Step Six

The wizard displays all of the data you've entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Six is correct, click the Finish button to complete the process and house the applicant.

House Applicant (Step 6 of 6)

Confirm House Applicant Information

Social Security # 517-44-8156

Applicant Name ENRICO M CHIVADORI

Waiting List SECTION 8, LIST A

Bedrooms 1

Data Area Section 8 Documentation

Voucher 12135141

Project KY132VD0001

Address 3569 PIMLICO PKWY APT 4

City, State, Zip LEXINGTON KY 40517

Tenant Type Section 8 Voucher

Date Housed 01/04/2002

Instructions: Confirm the above values, and click Finish to complete the task.

<< Back Finish >> Cancel

# Deleting Unmatched Household Records

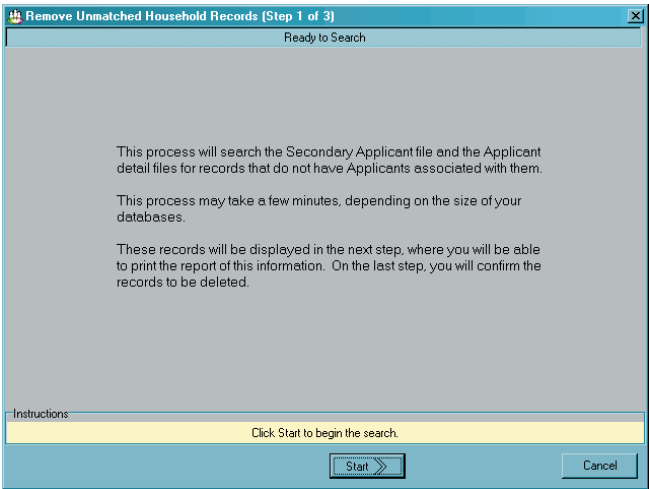
You can delete “orphan” income, asset, expense, and household member records from the Other Functions menu of the Setup screen’s Default Settings tab.

## Remove Unmatched Household Records Wizard

### Step One

In Step One, the wizard summarizes the process that it is about to perform.

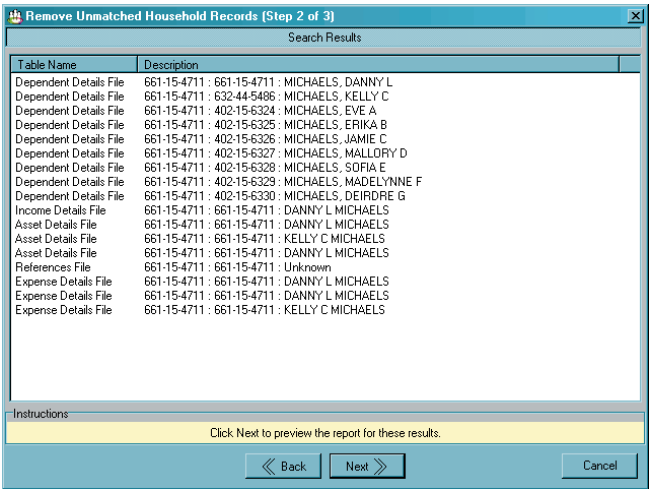
Click the Start button to proceed to Step Two.



### Step Two

In Step Two, the wizard displays a table of all unmatched records that it has found.

Click the Next button to proceed to Step Three.



When you click Next, a standard WinTen<sup>2</sup> print preview screen opens with a report that lists all unmatched records that the wizard found. Use the standard toolbar buttons to print this report, then click the Close button to continue to Step Three.

Listing of Unmatched Household Records to be Deleted

Run By:MKH

TENMAST CITY HOUSING AUTHOR  
Listing of Unmatched Household Records to  
h:\mktten\mktph

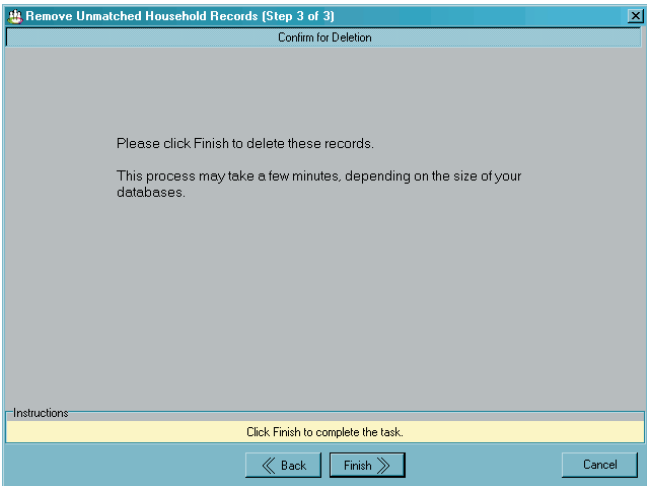
|                              |   |             |   |             |   |                       |             |   |             |   |                  |
|------------------------------|---|-------------|---|-------------|---|-----------------------|-------------|---|-------------|---|------------------|
| Dependent Details File       | : | 661-15-4711 | : | 661-15-4711 | : | MICHAELS, DANNY L     |             |   |             |   |                  |
| Dependent Details File       | : | 661-15-4711 | : | 632-44-5486 | : | MICHAELS, KELLY C     |             |   |             |   |                  |
| Dependent Details File       | : | 661-15-4711 | : | 402-15-6324 | : | MICHAELS, EVE A       |             |   |             |   |                  |
| Dependent Details File       | : | 661-15-4711 | : | 402-15-6325 | : | MICHAELS, ERIKA B     |             |   |             |   |                  |
| Dependent Details File       | : | 661-15-4711 | : | 402-15-6326 | : | MICHAELS, JAMIE C     |             |   |             |   |                  |
| Dependent Details File       | : | 661-15-4711 | : | 402-15-6327 | : | MICHAELS, MALLORY D   |             |   |             |   |                  |
| Dependent Details File       | : | 661-15-4711 | : | 402-15-6328 | : | MICHAELS, SOFIA E     |             |   |             |   |                  |
| Dependent Details File       | : | 661-15-4711 | : | 402-15-6329 | : | MICHAELS, MADELYNNE F |             |   |             |   |                  |
| Dependent Details File       | : | 661-15-4711 | : | 402-15-6330 | : | MICHAELS, DEIRDRE G   |             |   |             |   |                  |
| Dependent Details File Total |   |             |   |             |   | 9                     |             |   |             |   |                  |
| Income Details File          |   |             |   |             |   | :                     | 661-15-4711 | : | 661-15-4711 | : | DANNY L MICHAELS |
| Income Details File Total    |   |             |   |             |   | 1                     |             |   |             |   |                  |
| Asset Details File           |   |             |   |             |   | :                     | 661-15-4711 | : | 661-15-4711 | : | DANNY L MICHAELS |
| Asset Details File           |   |             |   |             |   | :                     | 661-15-4711 | : | 661-15-4711 | : | KELLY C MICHAELS |
| Asset Details File           |   |             |   |             |   | :                     | 661-15-4711 | : | 661-15-4711 | : | DANNY L MICHAELS |

0% Page 1 of 1

Step Three

In Step Three, the wizard displays a summary of the deletion process it is about to perform.

Click the Finish button to delete all unmatched records and complete the process.



This screenshot shows a confirmation window titled "Remove Unmatched Household Records (Step 3 of 3)". The window prompts the user to click "Finish" to delete the records, noting that the process may take a few minutes. At the bottom, there are "Back", "Finish", and "Cancel" buttons.

Confirm for Deletion

Please click Finish to delete these records.

This process may take a few minutes, depending on the size of your databases.

Instructions: Click Finish to complete the task.

Back Finish Cancel

# Creating a New Purge List

The waiting list purge process, described in Chapter 8, first requires you to create a list of applicants to be purged. To create such a list, click the Purge button on the Main Menu to open the Waiting List Purge screen. From this screen, click the Add button. This starts the Create Purge List wizard.

## Create Purge List Wizard

### Step One

In Step One, select the waiting lists for which to create the purge list.

Click the Start button to proceed to Step Two.

The screenshot shows the 'Create Purge List Wizard (Step 1 of 4)' window. The title bar is blue with a yellow icon. The main area is titled 'Select Waiting List' and contains a list box with two items: 'SECTION 8, LIST A' and 'PUBLIC HOUSING, LIST A'. The second item is selected with a checkmark. Below the list box are two buttons: 'Mark All' (with a checked checkbox) and 'Unmark All' (with an unchecked checkbox). Below these buttons is a text box containing the message: 'This Wizard will create a list of applicants that will be sent purge notice letters.' At the bottom, there is a yellow 'Instructions' bar with the text: 'Select the waiting lists that should be included in this purge process.' Below the instructions bar are two buttons: 'Start >>' and 'Cancel'.

### Step Two

Enter a brief description of the purge list you are creating.

Select the date on which the first notification letter will be sent to all applicants on the purge list.

Select the date by which applicants must respond to be removed from the purge list.

Click the Next button to proceed to Step Three.

The screenshot shows the 'Create Purge List Wizard (Step 2 of 4)' window. The title bar is blue with a yellow icon. The main area is titled 'Enter Date Range'. It contains a 'Selected Waiting Lists' section with a list box showing 'PUBLIC HOUSING, LIST A'. Below this is a 'Purge Description' text box containing 'Public Housing Purge - Spring 2003'. Below the description are two date pickers: 'First Notification Date' set to '2/ 6/2003' and 'Response Required By Date' set to '3/ 8/2003'. At the bottom, there is a yellow 'Instructions' bar with the text: 'Enter the purge description, notification date, and response required date.' Below the instructions bar are three buttons: '<< Back', 'Next >>', and 'Cancel'.

## Step Three

Select the applicants to include on the purge list: all applicants on the selected waiting list(s), only those applicants with a last contact date earlier than a selected date, or only applicants with one of a set of selected status codes.

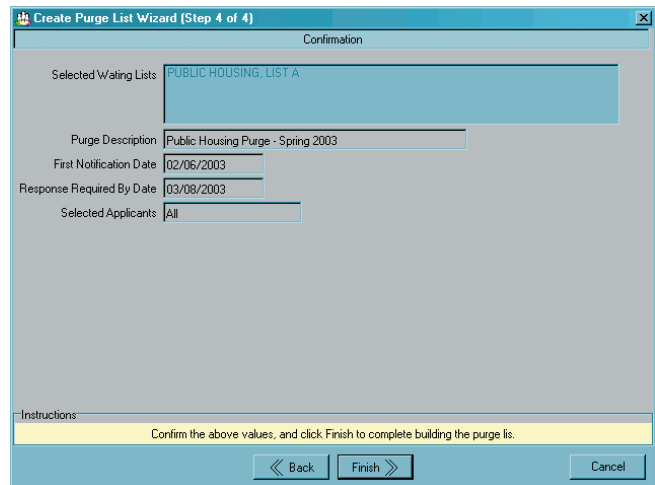
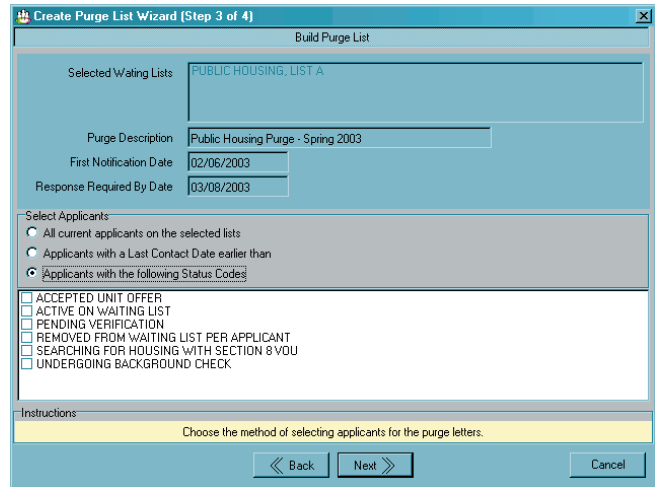
If you select all applicants with one of a set of selected status codes, a set of check boxes appears under the radio button with every status code that could justify purging an applicant from a waiting list (see right). Check the box next to each status code that will include an applicant on this purge list.

If you select all applicants with a last contact date earlier than a specified date, a date field appears next to the appropriate radio button (see right). Enter the “must have been contacted since” date.

When you are done, click the Next button to proceed to Step Four.

## Step Four

The wizard displays all of the data you’ve entered for the process. Review it. If you need to make any changes, click the Back button to go back to the appropriate step and make those changes. If everything shown in Step Four is correct, click the Finish button to complete the process and create the purge list.





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